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ABSTRACT

Placement team decision making for elementary or junior high learning disabled students was studied in a naturalistic investigation of 38 meetings using both observation and videotaping procedures. Teams of researchers collected data on the effectiveness of the special education team process, the domains of data and kinds of assessment data discussed during placement team decision making, the extent to which the process is data based, the participation of regular education teachers in the process, the generation of intervention statements by teams, and the views of placement team members. Among findings were that almost half the time in a team meeting was spent discussing assessment information and that regular classroom teachers participated very little in team meetings. (Author/DB)

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University of Minnesota

Research Report No. 40

A NATURALISTIC INVESTIGATION OF SPECIAL EDUCATION TEAM MEETINGS

James E. Ysseldyke, Bob Algozzine, and Martha Thurlow

Editors

IRLD

Institute for Research on Learning Disabilities

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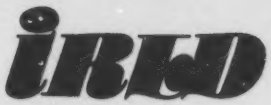

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I. Adequacy of Norm-Referenced Data for Prediction of Success

II. Computer Simulation Research on the Assessment/Decision-making/Intervention Process

III. Comparative Research on Children Labeled LD and Children Failing Academically but not Labeled LD

IV. Surveys on In-the-Field Assessment, Decision Making, and Intervention

V. Ethological Research on Placement Team Decision Making

VI. Bias Following Assessment

VII. Reliability and Validity of Formative Evaluation Procedures

VIII. Data-Utilization Systems in Instructional Programming

Additional information on these research areas may be obtained by writing to the Editor at the Institute.

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Special appreciation is extended to those school districts, schools, and individuals who allowed us to observe and videotape their team meetings. We realize that the team decision-making process is one about which many educators feel confused and unsure; it is highly commendable that so many teams were concerned enough about improving the process that they would "expose" themselves to our camera and allow us to begin a research endeavor that we hope will lead to improvements in the educational decision-making process for learning disabled and other special education students.

Abstract

Placement team decision making for learning disabled students was studied in a naturalistic investigation of 38 meetings using both observation and videotaping procedures. Teams of researchers collected data on the effectiveness of the special education team process, the domains of data and kinds of assessment data discussed during placement team decision making, the extent to which the process is data based, the participation of regular education teachers in the process, the generation of intervention statements by teams, and the views of placement team members. Results are presented for each research question and implications for special education team decision making are discussed.

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CHAPTER 1

Introduction

James E. Ysseldyke and Bob Algozzine

Research efforts of the Institute for Research on Learning Disabilities at the University of Minnesota focus on the complex set of theoretical, conceptual, practical, and empirical issues in the identification and assessment of the heterogeneous group of students labeled learning disabled. This research report describes the results of a naturalistic investigation of placement team decision making for learning disabled students. The research employed both videotaping and observation procedures. Its goal was to identify and evaluate relevant variables in placement team meetings that affect the decision-making process.

Background

Under the requirements of Public Law 94-142 school personnel must meet in multidisciplinary teams to make placement and instructional planning decisions about handicapped or potentially handicapped students. While some provisions are specific regarding the ways in which teams must operate, there is little empirical evidence on the ways in which such teams do, in fact, operate.

Recent investigations of placement team decision making have employed both self-report and observational methodologies. A major investigation using self-report methodology was conducted by personnel in the Bureau of Education for the Handicapped and reported in a series of research reports and manuscripts (Fenton, Yoshida, & Kaufman, Note 1; Fenton,

Yoshida, Maxwell, & Kaufman, 1979, Notes 2-4; Hoff, Fenton, Yoshida, & Kaufman, 1978; Yoshida, Fenton, Maxwell, & Kaufman, 1978a, 1978b, Notes 5-7). These authors draw on theory and research on group decision making and group problem solving to develop a decision model to serve as a guide for structuring and evaluating the decision-making process. They used a questionnaire methodology to study team members' participation, satisfaction, recognition of goals, and role expectations. They also evaluated team members' views of parental involvement in decision making and team communication with teachers and parents.

Findings reported by the BEH investigators were basically discouraging. Yoshida et al. (1978a, Note 6) investigated the relationship between perceived participation and perceived satisfaction, reporting that while participation is positively related to satisfaction, and while placement team members' roles are positively related to participation, there is little relationship between role and satisfaction. Appraisal personnel (school psychologists, social workers, counselors) and administrators reported that they participated in decision making more often than did regular or special education teachers. Regular education teachers perceived themselves as low both in participation and satisfaction with the team decision-making process. Yoshida et al. (Note 6) stated that "regular education teachers, who are pivotal persons in operationalizing and implementing the PT [placement team] decisions, are low in participation and are generally not satisfied with the PT process" (p. 13). Yoshida et al. (1978b, Note 7) reported that regular education teachers were present at 43% of the meetings. They concluded: "Clearly, instructional

personnel appear to be the most disenfranchised from the process, despite the fact that they are the individuals most responsible for implementing PT decisions" (Note 6, p. 13).

Fenton et al. (Note 2) used the data obtained in the BEH investigation of Connecticut personnel to study role expectations. They reported that there was considerable intra- and inter-role ambiguity about what activiites were appropriate for principals, school psychologists, special education teachers, and regular education teachers. Fenton et al. (Note 2) reported that in less than 40% of the meetings they surveyed did more than three-quarters of the team members recognize they had responsibility for making a decision. In addition, they noted a generalized lack of clarity regarding goals of the meeting (cf. Note 3).

Fenton et al. (Note 4) looked more specifically at the nature of participation as reported by decision makers. They identified three kinds of activities in which placement team personnel engage: perceiving the problem, exploring alternatives, and seeking a solution. Table 1-1 is a summary of the responses reported by surveyed professionals. The table includes behaviors reported as "usual" and "appropriate." The greatest percentage of meetings devoted time to data presentation and "participating in decision making." The authors concluded that there was considerable disparity between what people said should occur and what actually did occur. According to Fenton et al. (Note 4), there was a "notable deficiency in multidisciplinary establishment of criteria to guide the decision making as well as a lack of team planning for implementation and evaluation of the student's new educational program" (Abstract).

Insert Table 1-1 about here

Poland, Ysseldyke, Thurlow, and Mirkin (1979) reported the results of a survey in which they asked directors of special education to describe aspects of the special education team decision-making process. Directors reported that most placement team meetings range in length from 25 minutes to 2 hours, with an average length of 50 minutes. Directors were asked to identify typical compositions of team meetings held for the purpose of making screening, placement, and instructional planning decisions. Those five professionals most often included in placement team meetings were parents, administrators, special education teachers, school psychologists, and regular education teachers. Yet, when the directors were asked who, besides parents, should participate in meetings, they identified regular classroom teachers first (79.8%), followed by special education teachers (71.7%), school psychologists (63.6%), principals (27.3%), directors of special education (24.2%), and other school administrators (23.2%).

An early attempt (before PL 94-142) to observe and describe the special education selection process was conducted by Patton (1976) during the spring of 1974 in Westville, a major metropolitan school district in California. He attended meetings of various admissions committees (Art, EH, EMR, TMR, Gifted) and conducted formal and informal interviews with committee members. He reported:

> Although the various admissions committees are supposed to review and evaluate the recommendations made by teachers and psychologists, three of the five committees "rubber stamp" the recommendations made to them....partial data is [sic] often used to decide which students to admit to

> special programs; and experts often rely upon rules of thumb to expedite decisions. In most cases parents or lay persons are not included in the decision process. Decisions are not made by the persons who will have to live with them and confidence cannot necessarily be placed in the decisions which are made. (pp. 103-104)

Two recent investigations have used naturalistic observation to study the placement team decision-making process. Applied Management Sciences (1979) reported the results of a study for determining the least restrictive environment for handicapped students. In the AMS study, 134 placement team meetings were observed in 15 LEAs in five states. Decisions were made about 96 students at these 134 meetings. Trained observers attended the meetings and completed evaluative summaries and ratings following the meetings. The findings of AMS are summarized in Table 1-2. Again, the findings point to several deficiencies in the team decision-making process.

Insert Table 1-2 about here

One other observational study was completed by Goldstein, Strickland, Turnbull, and Curry (1980). They looked at the participants present at meetings, the nature and frequency of topics discussed, and the length of the conferences. Resource teachers were the most dominant participants in the meetings; the majority of team time was spent discussing curriculum goals and objectives.

Research Questions

The major research questions that were asked, following the identification of a number of important variables to study, were:

- To what extent is the special education team process effective?
- What kinds of data about students are discussed at special education team meetings?
- What domains of assessment information are discussed at special education team meetings?
- To what extent is the special education team process data based?
- What is the extent and nature of teacher participation in the special education team process?
- To what extent are intervention statements generated by special education decision-making teams?
- What are the views of team members following participation in the special education team process?

Within each of these research questions, several specific questions were raised. These are detailed within this report.

Highlights of Major Findings

Chapters 4 to 10 describe in detail the major investigations. The major findings were as follows:

- Meetings varied considerably in the extent to which "characteristics of effective team meetings" were evidenced. Specifically,
  - The purpose of the meeting was seldom stated by team members, and there almost never was a statement of the decision(s) to be reached.
  - More time was spent in meetings describing needs than in generating alternative solutions to problems.
  - The roles of team members were never clearly defined, and never was a statement made encouraging participation by individuals.

- Parents were never asked their understanding of the purpose of the meeting nor their expectations regarding the meeting.
- Parental input was requested occasionally during meetings, usually in verification of an observed problem.
- In only 27% of the meetings was language at a level that we believed parents could understand.
- "Least restrictive environment" was never explicitly stated, nor was the concept employed in making placement decisions.
- In 81% of the meetings there was a clear effort to relate the data to the nature of the problem.
- In 75% of the meetings pupil strengths as well as weaknesses were discussed.
- Everyday data on classroom performance were considered in addition to psychometric and edumetric data.
- Decisions were made in 88% of the meetings, yet we were unable to ascertain who made the decision or the specific nature of the decision.

- Over 20% of the time in placement team meetings was spent discussing specific academic characteristics of the child, 10% of the time was given to behavioral descriptions, and a negligible amount of time (0 - 1%) was spent describing students' physical status or problems.
- On the average, almost half of the time in a team meeting was spent discussing assessment information.
- When assessment information was discussed (47.2% of the time), 17% of the time was spent describing classroom behavior and performance on achievement tests; 7% was spent discussing results of intelligence tests, 4% psycholinguistic tests, 2% perceptual-motor tests, and 2% personality tests.

- Regular classroom teachers participated very little in team meetings.
- The principal, special education teacher, and school psychologist were much more actively involved in proposing service options than the regular education teacher and the parent.
- Teachers and parents were more actively involved in initiation of goals and method statements than in proposing placement options.
- Post-meeting views of the participants indicated considerable consensus regarding desired members of the team, adequacy of time spent preparing for the meeting, activities engaged in, factors felt to influence the outcome, and reactions to the process.
  - Desired team members were the same individuals who were present most often (regular class teachers, LD teachers, school psychologists)
  - The time spent preparing for the meeting was felt to be adequate; however, few team members reported exactly how much time was spent.
  - Presenting data and making comments on data were the most frequent activities that participants felt they were involved in during the meeting.
  - Data factors were believed to have had the greatest influence on the outcome of the team meeting; child characteristics were believed to have the least influence.
  - Participants were satisfied with the meetings' outcomes, believed the team approach is an effective way to make decisions about students, and felt they were an important part of the meetings.
  - Over 65% of the participants did not feel their view of the child had changed significantly as a result of the meeting.

CHAPTER 2

What is a Typical Team Meeting?

Martha L. Thurlow

In order for the data derived from naturalistic observation and videotaping of placement team meetings to be of most value, the meetings selected for study must be representative of typical meetings. While no investigation has attempted to describe, in full, the typical placement team meeting, selected components of such meetings have been studied and described by various researchers. Included among the topics of study have been (a) team membership, (b) length of meeting, (c) factors believed to influence the outcome, (d) the assessment devices used to collect data for team decision making, and (e) members' views of participation in, and satisfaction with, the meeting. This chapter summarizes the information that has been collected to date, and from this information attempts to describe the "typical" placement team meeting.

Team Membership

Surveys of special education directors (Poland et al., 1979) and Child Service Demonstration Centers (Thurlow & Ysseldyke, 1979) across the nation indicated that the average number of individuals participating in placement team meetings was approximately eight or nine individuals (Directors: $\bar{X}$ = 9.0, SD = 2.7; CSDCs: $\bar{X}$ = 8.2, SD = 2.7). However, the ranges in the reported sizes of such team meetings were relatively great, varying from one to 15 according to directors and from three to 16 according to CSDCs. For a sample of placement teams (N = 23) in Nebraska[1], the average team size was three individuals ($\bar{X}$ = 3.3, SD = 1.1), with the

numbers ranging from two to six. For a restricted sample of other placement teams in three states[2] (N = 6), the number of individuals attending the team meetings was approximately six ($\bar{X}$ = 5.7, SD = 1.2), with the numbers ranging from four to seven.

Table 2-1 summarizes the membership of placement teams described by directors and CSDCs, and reported by selected teams in Nebraska, and other states. Clearly, some individuals "typically" were found in the team meetings. Most frequently included overall were the school psychologist and regular education teacher. Data collected by Yoshida et al. (1978a) in Connecticut suggested that the individuals most frequently involved in team meetings were special education teachers, school administrators (principals), regular education teachers, and school counselors. However, the variability in the individuals included in each sample was great: the 99 special education directors listing team members identified 34 different professional roles; the 38 CSDCs listing members named 30 different professional roles; placement teams in Nebraska included 11 different roles; placement teams in other states listed nine different roles. Yoshida et al. (Note 6) identified 14 different roles.

Insert Table 2-1 about here

Length of Meeting

The most comprehensive data on the average length of placement team meetings was obtained by Poland et al. (1979) in their survey of special education directors from 49 states. The directors reported meetings ranging in duration from five minutes to 16 hours. The average meeting

was 50 minutes ($\bar{X}$ = 51.0, SD = 25.1, N = 99). The longest meetings averaged two hours, or 120 minutes ($\bar{X}$ = 121.7, SD - 99.5, N = 98), while the shortest meetings averaged 25 minutes ($\bar{X}$ = 25.2, SD = 12.9, N = 97). For the samples of placement team meetings in Nebraska and other states, the average duration of the meetings was 40 minutes ($\bar{X}$ = 40.6, SD = 26.6, N = 23) and 45 minutes ($\bar{X}$ = 47.1, SD = 23.6, N = 7), respectively.

Factors Believed to Influence the Meeting Outcome

Table 2-2 presents directors', Nebraska team members', and other states' team members' ratings of the influence of a variety of factors on the team decision about a child. A rating of one indicates no influence and a rating of five indicates a very significant influence. Across the three samples, data factors were believed to have the greatest influence on decisions, child characteristics had the least influence, and constraint factors were in between. However, there were some striking differences among the samples. For example, medical information was rated as having an "almost significant" influence ($\bar{X}$ = 3.85) by special education directors and as having an "insignificant" influence ($\bar{X}$ = 2.11) by team members in the sample from three states. The variability of ratings within samples was great also. For nearly every factor, ratings ranging from 1 (no influence) to 5 (very significant influence) were assigned within each sample.

Insert Table 2-2 about here

Assessment Devices Used to Collect Data

Information on the assessment devices used to collect information for team meetings was available from CSDCs, Nebraska teams, and the sample of teams in three states. Table 2-3 provides summary information about the assessment devices used in the three samples. As indicated in the table, large numbers of tests were used to collect information for team meetings. As suggested by the number of different devices used, tests were not used consistently across team meetings. Yet, there were some tests that were used more frequently than others. The PIAT was among the top five tests in all three samples. Six other tests (Beery, Key Math, PPVT, Slosson, WISC-R, and WRAT) were among the top five in two of the three samples. All of these tests are either intelligence or achievement tests except the Beery, which is a perceptual-motor test.

Insert Table 2-3 about here

Members' Views of Their Participation and Satisfaction

Yoshida et al. (1978a) made one of the first attempts to evaluate team members' participation in meetings and their satisfaction with the meetings. They found a positive relationship between role and participation, and between level of satisfaction and extent of participation, with regular education teachers showing the lowest participation and satisfaction, and school psychologists showing the highest levels.

Members of the team meetings in Nebraska and other states were asked to indicate their agreement with three statements about the meetings in which they had participated: (a) I am satisfied with the

outcome of this meeting, (b) My presence at the meeting was necessary, and (c) The team approach is an effective way to make decisions about students. Each individual rated the items on a 1 to 5 scale, where 1 = strongly disagree and 5 = strongly agree. The mean ratings given to the statements in the two samples are presented in Table 2-4. These individuals expressed general satisfaction with the meetings' outcome, their presence there, and the value of the team approach. However, the Nebraska team members showed greater variability in their responses: on the first statement, their ratings ranged from 1 to 5; on the second and third, their ratings ranged from 2 to 5. For the team members in other states, ratings on the first two statements ranged from 2 to 5; on the other statement (value of team approach), only 4 and 5 ratings were given.

Insert Table 2-4 about here

Summary

Available data for describing the characteristics of a typical team meeting are limited. Only a few investigators have attempted to study team meetings, and these investigations have been rather limited in scope. This state of affairs is understandable, for the team meeting reflects a variety of interacting factors that must be separated for systematic study.

The picture of the typical team meeting that develops from the research is of a group of individuals, varying in number and in professional roles represented, who meet for approximately 40 to 45 minutes.

Most often, the meeting involves about five to 10 people, and usually includes teachers, administrators, and school psychologists. Team members believe that data factors have the greatest influence on the decisions they reach, while child characteristic factors have little influence. Data from a great number of devices are collected to help them make their decisions, but most of the devices provide them with information on the student's intellectual functioning and achievement. Overall, team members are satisfied with the team approach to decision making, and with the outcome of the meetings in which they participated; they believe their presence at the meetings was necessary.

While the above picture can be created from the available data, perhaps more evident in the data is the fact that there is a good deal of variability from one team to the next and that the "average" picture may not really describe any actual team meeting. Some "team" meetings involve only one person while others involve 16. Some meetings last five minutes while others last two hours. Some meetings include the classroom teacher while others do not; some include the special education teacher while others do not; some include the principal while others do not; and so on. While intellectual scores are believed to have primary influence on the team decision in some cases, in others they are believed to have no influence. The same can be stated for other data factors as well as for child characteristic and constraint factors. Similarly, a device used to collect assessment information for one meeting may not be used for another meeting. And, while most participants are happy with the team approach and its outcomes, there are those who are not satisfied with the process and its results.

CHAPTER 3

Methodology

James Ysseldyke and Bob Algozzine

We noted in Chapter 1 that this investigation was a naturalistic study of placement team meetings. The units of investigation were team meetings conducted in schools for the purpose of making placement decisions about a student. None of the meetings was contrived in any way; the decisions reached by team members were real and were to be implemented for actual students.

Subjects

Subjects were 38 team meetings in 16 school districts in Minnesota[3]. Two meetings were in urban schools, 18 in suburban schools, and 18 in rural schools. Meetings varied in length from 5 to 57 minutes with an average length of 31 minutes. Twenty-eight meetings were held to make decisions about a male student, 10 about a female student. Thirty-two meetings were at the elementary level, 6 at the junior high level.

Participation in meetings varied considerably. Team size ranged from 6 to 16 members ($\bar{X}$ = 7.4). Psychologists and learning disabilities teachers were present most often. Parents were present at 14 of the meetings and regular classroom teachers at 24 meetings.

General Procedures

Videotaping. Team meetings were videotaped to: (a) facilitate more efficient data collection, (b) enable more in-depth analysis of the meetings, and (c) provide a common sample of meetings for all data analyses.

Videotaping was completed either by one Institute investigator or by school personnel trained specifically in a common methodology. A standardized set of videotaping procedures was developed and used in all meetings (see Appendix A). Meetings were videotaped in the schools and equipment was always set up in a position that was both unobtrusive and provided a view of all team members. Members sat in a semicircle and camera position was fixed so that the camera operator could sit or leave the room. A microphone was placed in the center of the meeting table.

Prior to the meetings, permission slips were collected from all team members and a standard introduction/explanation was read. Team members were asked to introduce themselves by role at the start of the meeting. Only one kind of interruption took place in the meetings: meetings that exceeded 30 minutes were interrupted for two minutes to change tapes.

At the conclusion of each meeting, team members were asked to complete a brief set of questions regarding their perceptions of their role in the meeting, and their views of the extent to which specific factors influenced the outcome(s) of the meeting. The questions are described further in Chapter 10.

Transcriptions of videotapes. Since some of the research questions required very detailed analyses of statements made at team meetings, verbatim transcripts were made of all 38 meetings. All transcripts were verified by an independent investigator.

Naturalistic observation. It was believed that the act of video-

taping a team might significantly affect the course of the meeting, what was said, and perhaps even the outcome. Of course, we cannot prove otherwise. Yet, as one check on the procedure employed, we sent observers, with no tapes, into a number of additional meetings. The results of these naturalistic observations are reported in Chapter 4.

Methodologies Specific to Each Research Question

No common method of data collection could be used to address the several different research questions. First, not all meetings were appropriate for all questions. For example, meetings in which no teacher was present were not used for the research on teacher participation. Second, data collection procedures were designed specifically to address each of the research questions. Techniques included both observations (e.g., counts and interval recordings) and judgments (e.g., ratings on Likert-type scales). Specific methodologies and samples are described in detail in the individual chapters.

CHAPTER 4

The Special Education Team Process: To What Extent is it Effective?

Jean Mitchell

Both the professional literature on group decision making and federal rules and regulations concerning educational planning for students with handicaps indicate a number of aspects of team functioning that theoretically lead to optimal results in delivery of services to students. The nature of educational planning is such that a consensus form of decision making, characterized by clarity of goals and nonspecialized participation by all team members -- including parents and the school staff who will implement the program -- is predicted to lead to both maximum satisfaction and the greatest likelihood of the plan being carried out. Federal rules and regulations in PL 94-142 provide general guidelines on what constitutes an adequate team meeting. The purpose of this investigation was to ascertain the extent to which characteristics of effective team meetings (as defined in organizational theory literature and by federal rules and regulations) are demonstrated by special education placement teams.

The investigation was conducted in two parts. First, on the basis of suggestions in both the literature on decision making and in legislation, the theoretically optimal characteristics of effective special education placement team meetings were defined. Next, videotapes of special education placement team meetings were observed and the meetings evaluated in terms of the extent to which the proposed characteristics were present. We recognized that because of the considerable variability in the kinds

of decision-making meetings that are held, not all characteristics would or should apply to all meetings.

In practice, groups of educators get together for the purpose of making many different kinds of decisions about handicapped or potentially handicapped students. They may meet to decide whether a referred child should be assessed, to outline an assessment plan, to decide the appropriate placement for a student, or to develop an individual educational plan (IEP). This study focused on meetings held specifically to make placement decisions and/or to develop IEPs.

Characteristics of Effective Team Meetings

Team meetings held for the purpose of making placement and/or programming decisions have been characterized by Fenton et al. (Note 4) as fitting a kind of decision making described in the organizational theory literature as follows:

(a) the problem has many parts -- data from various sources must be integrated to make a series of complex decisions;

(b) team members possess problem solving skills and information needed to make decisions -- multiple perspectives are a primary asset of educational teams; and

(c) team members have shared responsibility for implementing and monitoring the program decisions.

In their review of research on decision making, Fenton et al. (Note 4) identified several factors that they viewed as facilitating effective decision making in placement or IEP meetings. These factors included

(a) consensus decision making, (b) clarity of goals, (c) structured separation of activities, (d) and nonspecialized participation by team members during each stage of decision making. Others (e.g., Schwartz, Steefel, & Schmuck, 1976; Yoshida et al., Note 6) report additional considerations. In developing a set of characteristics of effective team meetings we relied on the above sources in addition to rules and regulations on legislation. The following sections describe the characteristics in detail.

Consensus decision making. Schwartz et al. (1976) report that when groups of individuals meet for the purpose of making decisions, such as placement and programming decisions, the consensus form of decision making is theoretically most effective. A consensus decision occurs if every team member demonstrates understanding of the decision to be made, has an opportunity to express feelings about the decision, and publicly commits him/herself to carrying out the decision for a trial period. In making decisions about handicapped students, the objective is a consensus decision. The law, in fact, spells out procedural mechanisms for appeal when consensus is not reached.

Clarity of goals. The general goal of special education team meetings, as established in the Education for All Handicapped Children Act of 1975, is to provide a structure by which parents and school personnel jointly plan educational programs for children with handicaps. A team's legislated responsibilities include determining the student's eligibility for special education services, reviewing and interpreting assessment data, determining

the least restrictive appropriate placement, establishing annual goals and short-term objectives, and setting a timetable and method for reviewing student progress and modifying the program as necessary (Fenton et al., 1979).

The organization theory literature on group decision making stresses the importance of clarity of goals to group functioning. Schwartz et al. (1976) state that a "team's goals provide a framework for action and a standard by which to judge the effectiveness of these actions" (p. 48). Confusion regarding goals may result in inefficient expenditure of time and energy, members acting at cross-purposes, frustration, and conflict. Schwartz et al. describe a sequence of goal-related activities which contribute to team effectiveness:

(a) the team discusses goals in specific terms that are understood by every team member;

(b) the team specifies a method for evaluating progress toward its goals; and

(c) the team modifies its behavior on the basis of evaluation information.

Fenton et al. (1979) reason that team goals are more likely to be fulfilled when all members understand the team's responsibilities than when the goals are unclear and there is subsequently little group direction or pressure to accomplish them. In placement team meetings, lack of goal clarity may lead to failure to engage in appropriate decision-making activities, a lack of attention to each stage of the decision-making

process, and ineffective behaviors (e.g., disproportionate time discussing data of minor consequence, nit picking, and irrelevant discussion).

Fenton et al. (1979) investigated perceptions of placement team (PT) goals by school personnel representing 10 staff roles. Team members responded to a questionnaire, rating 11 goals derived from PL 94-142 as appropriate or inappropriate for PT activity. While administrators, support personnel, and special education teachers averaged 70-73% agreement with the goals, classroom teachers showed considerably less awareness of the goals (parent and student team members were not interviewed). The researchers concluded that "placement team members are neither fully aware of, nor in agreement about, their placement team duties" (p. 643).

Structured separation of decision-making activities. In reviewing a variety of models for group decision making, Fenton et al. (Note 4) identified a common set of activities associated with the decision process:

> Perceiving the problem entails collecting and examining relevant information, determining the educational significance of the data, and identifying the student's special service needs.
>
> Exploring alternatives includes generating a broad list of alternatives and recognizing the student's special service needs as the primary criteria for selecting an appropriate solution.
>
> Selecting a solution requires evaluating each proposed alternative, selecting one as the most reasonable course of action, and planning program implementation and monitoring. (p. 2)

Groups tend to merge these steps during the decision process, generating and evaluating each alternative, one by one, until a solution arises that satisfies at least the majority of members. However, Fenton et al. (Note 4) cite problem-solving research which indicates that the group can proceed more systematically, improve decision quality, and increase group understanding and acceptance of the decision through efforts to: (a) explicitly separate the stages of generating and evaluating alternatives; (b) specify the criteria for evaluating alternatives, and (c) use an agenda to logically order decision-making activities.

Fenton et al. (Note 4) found, from responses by placement team participants in the state of Connecticut, that only three of the proposed nine steps in their "rational decision-making" model were perceived by a majority of placement team participants as appropriate team activities. They hypothesized that teams probably were not engaging in these activities since most of them are not perceived to be appropriate team functions.

Nonspecialized participation. Nonspecialized participation occurs when all team members engage in decision-making functions (interpreting data, generating alternatives, evaluating, etc.) without regard to role or specialty. A review by Shaw (1964) indicates that decisions comparable to those made by special education teams (i.e., dealing with multifaceted problems that must be solved and implemented by team members capable of performing problem-solving skills) are most effective when characterized by nonspecialized participation.

Fenton et al. (Note 4) add that active participation in decision making is particularly critical "when implementation of the decision

requires initiative, judgment, or creativity on the part of the implementers as it does in a teaching situation" (p. 4). Further research (Hoffman & Maier, 1959, 1961) suggests that even if members do not actually participate, their willingness to accept the decision is positively related to their perception of opportunity for participation.

While this decision-making literature strongly suggests the need for special education team meetings to be structured in such a manner as to encourage equal and nonspecialized participation by all team members, there is no research providing information as to whether this occurs in practice. A study by Fenton et al. (Note 2) indicates that most placement team members do not perceive their role to be to participate equally in all aspects of decision making.

Federal legislation requires that local education agencies ensure that team meetings held for the purpose of planning individual educational programs for handicapped students include: (a) a representative of the LEA other than the referred student's teacher, (b) the student's teacher, (c) the parent, and (d) the student (when appropriate). A school staff member familiar with the assessment procedures and results should be present. Other participants may be invited by the parent(s) or LEA. However, Bureau of Education for the Handicapped policy recognizes that large meetings may not only be costly, but may inhibit parent participation as well.

On the other hand, research suggests the importance of including those who will be implementing the program in the planning process. Schwartz et al. (1976) state that those "who take part in the actual

making of a decision are more likely to be committed to the decision than are those to whom the decision is merely handed down" (p. 57). Those who share influence in making a decision tend to share responsibility for its implementation.

In addition, a study of special education decision making and implementation by Yoshida et al. (1978b, Note 7) found that communication between decision makers and program implementers tended to be informal. Typically, team members depended on oral communication to provide information to those responsible for carrying out the educational plan. Thus, while it is not a legal requirement that school personnel responsible for implementation be present, their active participation in planning may help assure that the decision is carried out.

While these findings indicate the importance of including implementers in educational planning, another study by Yoshida et al. (1978a) found that "attending the meeting does not translate into participation and satisfaction" (p. 243), and that instructional staff (implementers) who attended placement team meetings tended to report the least participation in and satisfaction with team decisions.

This finding suggests that there may be constraints on full and equal participation by all team members. Special education team meetings occur in the social context of norms and expectations previously existing within the school and district, as well as between home and school. Schwartz et al. (1976) observed that school personnel are perceived traditionally as experts, responsible for making educational decisions for children and families. This pattern would tend to interfere with full and

equal participation by parents. Within the school staff, members vary in power, influence, and expectations for performance associated with their particular role (Yoshida et al., 1978a). In addition, barriers such as lack of information, specialized vocabulary and skills, and inexperience with special education may prevent some members, particularly nonprofessionals, from actively participating.

Participation by parents.[4] As mentioned above, one primary goal for placement team meetings, as specified in PL 94-142, is provision of a structure to encourage active parent participation in educational decisions for children with handicaps. While it is appropriate for the school staff to prepare and present assessment data, and, in some cases, recommendations, they are also directed to indicate to parents, at the outset of the meeting, that any recommendations are for review and discussion. It is the policy of the Bureau of Education for the Handicapped that parents be given the opportunity to participate in major decisions affecting the education of their handicapped children. It is of interest to determine the ways in which teams encourage or discourage active parent participation through cues such as explicitly requesting information, directing information to parents in understandable language, and making room for parent requests for information or clarification.

Legal requirements for team meetings. PL 94-142 establishes guidelines for the IEP meeting and report that are intended to (a) contribute to parent/school communication, (b) help manage implementation of the plan, and (c) establish a means to monitor compliance with the plan. Guidelines for data presentation and utilization, criteria for evaluating alternatives, and plans for implementation and program evaluation are provided.

Teams are required to consider the least restrictive alternative in evaluating placement alternatives; they are required to produce a written record (such as an IEP form) of the meeting. Data are to be provided in such a way that they contribute to a clear, understandable, and complete picture of the student's current educational performance. Data are to be derived from multiple sources and are to be discussed in clear and understandable language. Teams are to produce provisions, including a time schedule and assignment of responsibilities, for carrying out the decision(s) they reach. Criteria for success and provisions for program review are to be established.

Research Questions

Based on the review of literature summarized above, a specific set of characteristics of effective team meetings was developed. Team meetings were then observed to ascertain the extent to which the characteristics were evidenced. Items were included to facilitate answering several general research questions:

1. To what extent do teams verbalize their goals (i.e., state the purpose of the meeting and the decision(s) to be made)?

2. To what extent do each of the separate activities described as crucial to effective decision making by Fenton et al. (Note 4) occur (i.e., generating alternatives, stating the criteria for evaluation of alternatives, and selecting the best alternative on the basis of explicit criteria)?

3. To what extent do all team members actively participate in decision-making functions such as gathering information and verbalizing an opinion about the decision?

4. To what extent do team members encourage or discourage parent participation by explicitly requesting information, directing information to parents in understandable language, and providing opportunities for parents to request information or seek clarification?

5. To what extent do teams consider the least restrictive alternative in reaching a decision?

6. To what extent are data provided in such a way that they contribute to a clear, understandable, and complete picture of the student's current educational performance?

7. To what extent do teams produce provisions, including a time schedule and assignment of responsibilities, for carrying out the decisions they reach?

Method

Subjects. Thirty-four team meetings were observed. Most of these were videotaped, but some were live. Fifteen of the meetings were ones with parents present.

Instrument. An observational instrument was developed to collect data on the occurrence of the characteristics of effective team meetings (see Appendix B). The instrument consisted of 29 items divided into eight sections: (1) discussion regarding procedural issues (7 items), (2) data presentation and utilization (6 items), (3) team process (1 item), (4) generating alternatives (1 item), (5) evaluating alternatives (3 items), (6) making the final decision (3 items), (7) implementing the decision (4 items), and (8) meetings with parents present (4 items). Twenty-four items were scored in a "yes-no" format; the remaining five items were three-point Likert scales with descriptions at each point. Spaces for comments were provided after each item and at the end of the questionnaire. Observers scored "not applicable" for items that were irrelevant to the content of the meeting.

Observers. The observers were an advanced graduate student and a post-doctoral research fellow, both experienced participants in placement team meetings. The observers developed the instrument and a training manual,

and trained themselves by watching videotapes and arriving at a consensus regarding the items. Ambiguous items were eliminated from the instrument. Training was discontinued after a high level of agreement (80% or better) was obtained.

Procedure. The observers reviewed the tapes independently. Each observer viewed approximately one-half of the tapes. Two general approaches for completing the instrument were used: (a) completing the questionnaire directly as the meeting proceeded, or (b) taking narrative notes during the meeting to use in completing the questionnaire immediately afterwards. One observer coded some of the meetings live as opposed to videotaped. These differences in coding methods or styles were not seen as significant.

Inter-observer reliability. Reliability was assessed by having both observers independently code the same 10 meetings (over 25% of the meetings). These meetings were chosen randomly and the observers did not know which of their data would have reliability checks. Reliability was calculated for the 10 meetings by dividing the number of agreements by the number of agreements plus disagreements. Reliability of the items ranged from .20 to 1.00. The reliability for each item is presented in Tables 4-1 and 4-2. Items whose reliability was lower than .70 (11 items) were eliminated from further analyses.

Insert Tables 4-1 and 4-2 about here

Results

The observational data from the 34 meetings are summarized in Tables 4-1 and 4-2. Meetings varied considerably in the extent to which "characteristics of effective meetings" were evidenced. Data relevant to each of the research questions are summarized below.

The first research question addressed the extent to which teams verbalize their goals by stating the purpose of the meeting or the nature of the decision(s) to be reached. The purpose of the meeting was stated in only 35% of the meetings. In only four of the 34 meetings (12%) was there a statement of the decision to be made. In 84% of the meetings there was a statement of the reason for referral. Rather than stating the purpose of the meeting or the nature of the decision to be made, most team meetings began with a statement of the nature "As you are all aware, Jason was referred for evaluation because of the difficulties he is having in...."

Although data were collected relevant to the second research question, it was impossible to reach interrater agreement on the extent to which teams generated alternative solutions to address a student's educational needs. Clearly, more time was spent describing needs than generating alternative solutions. Clearly, alternative possible actions were stated. Yet, it was impossible for the evaluators to agree on the extent to which statements made were actually proposed alternative solutions. Because it was impossible to identify alternative solutions, it was equally difficult to identify criteria the team set for evaluating the efficacy of the alternatives. In none of the meetings was there a clearly

identifiable time set aside for generating alternatives and identifying criteria for evaluating them.

The third research question was really a series of questions on participation of individual team members in the decision-making process. The roles of team members were never clearly defined, and never was a statement made encouraging participation by individuals. As is noted in Chapter 8 of this report, team members can sit throughout an entire meeting without participating or being encouraged to participate.

The fourth research question addressed the role of parents in the decision-making process, specifically, the extent to which parents were asked their understanding of the purpose for the meeting and asked their expectations regarding the meeting. This never occurred. Parental input was requested occasionally during meetings, usually simply in verification of an observed problem (e.g., "Do you ever see this behavior at home?"). In only 27% of the meetings did the language seem to be at a level parents could understand. Technical terms simply were not defined; jargon (e.g., "He has a visual sequential memory problem," "Her primary strength is in the auditory modality") abounded.

For the fifth research question, the focus was on the extent to which the least restrictive environment was considered in making placement decisions. Least restrictive environment was never explictly stated, nor, in our opinion, was the concept employed in reaching a placement decision. In general, teams presented data, and then someone on the team recommended a placement. The efficacy of the placement was seldom discussed.

The sixth research question addressed the nature of data presentation, the clarity of the presentation, and the quality of the data presentation. As is described in other chapters throughout this research report, considerable data were presented. In 81% of the meetings there was a clear effort to relate the data to the nature of the problem, and in 75% of the meetings there was a discussion of strengths as well as weaknesses. In general (84% of the meetings) it can be said that everyday data on classroom performance were considered in addition to psychometric and edumetric data. However, as regards formal assessment data per se, 88% of the meetings included only data derived from norm-referenced tests. In only two meetings were formal behavioral assessment data presented.

Research question seven addressed the nature of the final decision and provisions for its implementation. Any search for consensus in decision making was certainly not explicit. Decisions were made in 88% of the meetings. Yet, we were unable to identify who made the decision or the specific nature of it. Team members simply did not challenge decisions made at the meetings. Because it was difficult to identify all aspects of the decision that was made, it was impossible to ascertain the extent to which procedures for implementing the decision were clearly articulated.

Discussion

Under the rules and regulations of PL 94-142, decisions about the placement and programming of handicapped or potentially handicapped students are to be made by teams of individuals. Few data sources

suggest that teams make better decisions than individuals. Data on the team decision-making process have consisted primarily of self-report data.

On the basis of a review of the literature on team decision making, and a review of the legal requirements on special education team decision making, a set of characteristics of effective team meetings was developed. This set of characteristics was used to evaluate the effectiveness of 34 special education team meetings.

The one area of strength observed was in data presentation and use. Most teams attempted to relate assessment data to the student's problem, everyday behavior was considered in addition to test data, and most teams discussed both strengths and weaknesses. In this portion of the study we did not evaluate the quality of data presentation and use. Teams were credited with having made an effort to relate data to the problem if they made an effort, even when there was little logic in the effort made.

In other areas, team meetings left much to be desired. Important procedures simply did not occur, and there was little effort to encourage all team members to participate. We were unable reliably to gather data on the extent to which teams consider more than one alternative in reaching decisions. This was more than likely due to the fact that we did not separate placement from program decisions in our analysis. Applied Management Sciences (1979), in their observational study of the team decision-making process, found that rarely was more than one option considered when determining a child's placement, and that most written IEPs were developed after placement at a separate meeting. We found considerable

discussion of options, but had difficulty sorting relatively free floating discussion of alternatives from clear statements of options.

Clearly, major steps need to be taken to ensure that placement team meetings become more optimal. Significant advances could be made if such meetings simply were structured, with time allotted in the agenda to components described earlier.

CHAPTER 5

Domains of Data Discussed at Special Education Team Meetings

David Rostollan

Students are referred for psychoeducational evaluation because someone is concerned about their academic performance, behavior, physical well-being, or a combination of these. The data discussed at a team meeting should be congruent with the reasons for which the student was referred.

Only one content analysis of team meetings is available. Goldstein et al. (1980) studied the percentages of time team members, by role, spent discussing the child; categories recorded were curriculum, behavior, evaluation, personal/family, and performance. Data obtained by these investigators are summarized in Table 5-1, and are reported as percentages of time spent in the various activities. Goldstein et al. reported only the three highest categories for each role.

Insert Table 5-1 about here

Yoshida et al. (1978a, Note 6) conducted an analysis of participation by role, looking at how much time is spent contributing information, interpreting information, disagreeing with statements made by others, proposing alternatives, evaluating alternatives, and finalizing decisions. They did not record the specific content of meetings.

The purpose of this study was to record specifically the amount of time spent by placement teams discussing academic, behavioral, and physical data.

Method

Subjects. Observational data were collected from videotapes of 32 special education placement team meetings. The meetings ranged in length from five to 55 minutes.

Observers. Data were collected by an advanced graduate student. Reliability checks were completed by five other students trained in the observation system.

Observation system. Data collection was restricted to those statements made about the child; each statement was recorded as being academic, behavioral, or physical in nature. A statement was considered "Academic" when it dealt with academic skills, abilities, or aptitudes. Both quantitative and qualitative statements were recorded. Examples of the kinds of statements recorded as academic statements are listed below:

Academic Skills: "She knows all the consonant sounds." "He earned a grade score of 6.1 on the blending subtest."

Behaviors of an Academic Nature: "He learns new skills easily." "She uses her fingers in solving addition problems."

Cognitive Functioning: "Her score on the WISC-R was within the average range." "He was able to recall only sequences of three digits, demonstrating a weakness in auditory short-term memory."

Perceptual-Motor Functioning: "He reverses letters." "Her auditory discrimination problem interferes with reading."

Speech and Language Functioning: "Her articulation is developing normally." "He did not miss any items on the receptive language subtest."

Academic Placement: "She is in a third grade reader." "He goes to a LD resource teacher for three hours a week."

Statements about a child's social behaviors and interpersonal skills, attention and motivation, emotional characteristics, and placement clearly related to behavior were coded in the "Behavior" category. Examples include the following: "She disrupts reading instruction nearly every day"; "She is more outgoing than other kids"; "Her attention span is short"; "He's off-task 50% of the time"; "She was very anxious during testing"; and "He spends several hours a week in the time-out room."

Statements coded as "Physical" data dealt with the student's actual physical state (e.g., information about a physical examination, sensory acuity, birth or physical history, physical conditions, etc.).

Since the major purpose of this investigation was to identify the categories of statements made about the child, general academic, behavioral, and physical statements were not recorded (e.g., explaining what letter reversals are, attempts to define maturity, descriptions of testing techniques, etc.).

Procedure. In addition to the videotape recorder, television, and videotapes, the materials for data collection included an audio tape recorder and tape which signaled 10 second intervals, and an observation sheet on which the observer coded Academic, Behavioral, or Physical data being discussed. A sample coding sheet is included in Appendix C.

The method of recording data was partial interval time sampling. The observer coded data whenever a single instance of an appropriate response occurred within a given interval. The duration or frequency of occurrences within an interval was not considered.

The observer checked the appropriate boxes for all categories that were discussed by the team participants. Consequently, all three categories could be checked during a single interval. For example, a team member may have said, "John is a fourth grader, but his eighth birthday was last month. In math he continues to show little motivation, yet he generally gets perfect scores on assignments and tests." Should all these comments be within the same 10-second interval, all three categories would be checked for that interval. On the other hand, during some intervals, the team might not discuss any information pertaining to academic, behavioral, or physical data, and thus nothing would be recorded.

Partial sentences were coded in every interval in which the speaker's meaning was apparent. For example, in the statement "Jack is functioning at the 6th grade level in math - beep - as well as in reading and spelling," two intervals of Academic data would be coded, even though no specific data regarding reading and spelling were included in the second interval. That is, the system allowed the observer to "remember" what was said in a previous interval. However, it did not allow the observer to "predict" what will be said in a future interval. For example, for the statement "Based on all the tests in math and reading, Jack - beep- is functioning at sixth grade level," only the second interval would be coded as Academic data.

Reliability. Reliability checks on the collection of the data consisted of the evaluation of interrater agreement. Some comparisons involved another researcher simultaneously coding segments of randomly selected meetings with the main observer. Two researchers took part in

these reliability checks. Each of them coded data with the main observer on separate occasions. Approximately 20% of the total meeting time coded (2 hours of the 12 1/2 hours) was included in computing the reliability. Reliability data also were collected between the main observer and three observers who had previously collected comparable data on a smaller sample of the 32 meetings.

The general method of checking reliability was based on the frequency of intervals coded by each observer. The percentage of agreement was calculated by dividing the smaller frequency by the larger frequency, and multiplying by 100. Interrater agreement between observers coding simultaneously were: Academic (mean = 91%, median = 96%, range = 67% to 100%); Behavioral (mean = 83%, median = 84%, range = 61% to 100%). Agreement between the main observer and previous coders were: Academic (mean = 81%, range = 33% to 100%); Behavioral (mean = 69%, range = 33% to 100%).

Results

The findings are presented in terms of the percentage of time a category was discussed in relation to the total length of each meeting. The general results are in Table 5-2. As is evident in the ranges of times, the percentage of time Academic, Behavioral, and Physical data occurred within meetings was quite varied. A negligible amount (0 - 1%) of a given category was discussed in some meetings, while in other instances approximately 30% (Behavioral) and 50% (Academic) of the intervals contained statements involving data. The two measures of central tendency (mean and median) had very similar values.

Insert Table 5-2 about here

For the 32 meetings observed, on the average, over 20% of the meeting was spent discussing specific academic characteristics of the child; approximately 10% of the time dealt with behavioral descriptions, and a negligible amount of time (0-1%) concerned physical characteristics. Because of the minimal findings regarding Physical data, this information was not included in the other data analyses.

Table 5-3 depicts the extent to which Academic and Behavioral statements occurred in relation to the initial referral concern. The referrals were characterized as emphasizing academic, behavioral, physical, or some combination of these. Since physical concerns along or in combination with academic concerns were indicated in only four of the cases, these meetings were not used in the analysis.

Insert Table 5-3 about here

For the academic, behavioral, and academic/behavioral referral concerns, the results were very consistent. The percentage of time Academic statements were made was greatest for meetings in which the referral concern was academic ($\bar{X}$=26.0%); it was somewhat less when there were academic/behavioral concerns ($\bar{X}$=22.0%), and was least when there were behavioral concerns ($\bar{X}$=9.8%). Comparable results were found for the Behavior category. The highest percentages for discussing behavioral data occurred

when behavior was the referral concern ($\bar{X}$=20.3%), less when academic/ behavioral concerns existed ($\bar{X}$=12.0%), and least when academics was the referral concern ($\bar{X}$=8.22%).

Examination of the data in another manner produced similar results. Fifteen of the 16 meetings in which the referral indicated academic concerns had more Academic data coded than Behavioral data; all six meetings in which the referral indicated behavioral concerns had more Behavioral data coded than Academic data.

Table 5-4 illustrates the relationship between the amount of time spent discussing Academic and Behavioral data and the length of the meeting. Three levels of meeting length were established, 0-15 minutes, 15-30 minutes, and 30 or more minutes. The number of meetings within these levels was quite similar, 10, 11, and 11, respectively. Behavioral data consistently were discussed approximately 10% of the time, regardless of the length of the meeting. Academic data on the average were discussed slightly less than 20% of the time in meetings of 0-30 minutes. However, the percentage of time discussing specific academic characteristics rose to almost 30% when the meetings were over 30 minutes long.

Insert Table 5-4 about here

Table 5-5 presents the breakdown of the percentage of time discussing Academic and Behavioral data according to the sex of the child referred. It appears that Behavior and especially Academic statements may occur a greater percentage of the time in meetings involving boys.

Insert Table 5-5 about here

Discussion

The results suggested that academic data were stressed in the meetings viewed. By no means was an overwhelming amount of time spent discussing any of the specific characteristics (academic, behavioral, or physical) of the child. Other chapters in this report give some indication of the other topic areas that were discussed during the major portions of the team meetings. It is possible that the minimal amount of Physical data presented was due to the type of meetings videotaped. Physical data probably play a more dominant role in team meetings that concern children with more extensive handicaps (retardation or multiple handicaps).

The data also suggested that participants of meetings do emphasize information consistent with the major concern(s) expressed in the referral. At least in general terms, Academic data were stressed when there were academic referral concerns, and Behavioral data were stressed when there were behavioral concerns. However, the quality of the information also is an important factor; a relatively small amount of information may be presented (as occurred in many of the meetings), yet be sufficient to significantly affect a decision.

The amount of data presented was consistent across meetings of various lengths, with one exception. The longest meetings contained a greater percentage of Academic data. One may speculate that a reason for longer

team meetings is that there is more academic information to be presented. The finding that meetings about boys seemed to involve more Academic data was confounded by the fact that such meetings had the extreme percentages, very little or a great deal of coded data. A few meetings with a high percentage of such statements may increase the mean value.

Generally, the majority of the Academic data came at the beginning of the meetings, the Behavioral data during the middle, and neither type of information was included at the end of the meetings. Much of the Academic data seemed to pertain to grade equivalent scores from standardized norm-referenced tests. A great deal of the Behavioral information appeared to deal with motivation; the Physical data primarily involved hearing and vision tests. As mentioned previously, the amount and type of information was analyzed within this study. The next step is to analyze the quality of the data, regardless of whether they constitute only a minor segment or a major portion of the meeting.

CHAPTER 6

Domains of Assessment Information Discussed During Placement Team Decision Making

Mark Shinn

Each year more than 250 million standardized tests are administered to the nation's 44 million school-aged children. The purposes for these assessments are varied (Salvia & Ysseldyke, 1978); specifically, test information is used to screen and plan educational programs for children as well as to evaluate progress. The major purpose for administering tests to children thought to be handicapped is to determine eligibility for special placement (i.e., the classification decision).

Largely as a result of the passage of Public Law 94-142, classification decisions for students thought to be eligible for learning disabilities services are now being made through a team process. This process is conducted by a placement team whose composition of educational personnel differs considerably (see Chapter 2). In most instances, the presentation of assessment data about the student is the basis for making valid decisions. Poland et al. (1979) studied several aspects of current assessment and decision-making practices. An analysis of their results indicated that teacher reports of a child's classroom achievement were seen as being the most influential in the team decision-making process. However, other variables (e.g., parent information, test scores, observational data) also were rated as contributing significantly. It is important to note that this information about placement team decision making was obtained <u>indirectly</u> through the use of questionnaires and reflected

the opinions of individuals who are members of the placement team less than 25% of the time (Poland et al., 1979).

This investigation directly assessed the amount of time placement team members spend discussing the results of students' performances in the area of classroom behavior and test results. The domains of test information evaluated included intelligence, achievement, personality, perceptual-motor, and psycholinguistics.

Method

Subjects. A sample of 20 videotapes of placement team meetings was selected for this investigation. Each tape was selected on a random basis from among those available for study.

Observation system. Data were tabulated from the tapes using an interval method of recording responses. Each time unit was ten seconds in length; each time unit was coded in terms of the domain of information discussed for at least five seconds of the interval. Six domains of information were coded: intelligence, achievement, personality, perceptual-motor, psycholinguistics, classroom, and other. Scores as well as qualitative information were coded in each domain. Examples of this information for each category is presented in Table 6-1.

Insert Table 6-1 about here

Reliability. Reliability estimates for the observation system were determined by having two observers concurrently view selected tapes.

Approximately 15% of the 20 meetings (about 90 minutes) were selected for this purpose. The interrater agreement was calculated by dividing the number of agreements by the total number of agreements and disagreements. Mean reliability across sessions was .96 with a range of .84 to 1.00.

Results

The average length of the 20 meetings was approximately 30 minutes ($\bar{X}$ = 29.62). Of this time, slightly more than half of the meeting (52.8%) was spent discussing things other than test information; less than half of the meeting (approximately 15 minutes) was spent discussing data from the assessment domains of interest. Most time (17%) was spent discussing classroom data, followed by achievement (14%), intelligence (7%), psycholinguistics (4%), perceptual-motor (2%), and personality (2%). The percentages of total time and assessment discussion time spent on each domain of information are presented in Table 6-2; the actual amount of time spent for each is indicated also.

Insert Table 6-2 about here

Table 6-3 presents the results of an analysis on an individual meeting basis. For each meeting, the three most frequently discussed domains were determined. Again, data on what the child does in the classroom were the most frequently discussed; they were the most frequent in 10 of the meetings. The domains of intelligence and achievement were the most frequent domains discussed in four and five meetings, repectively, while personality was

most frequent in only one meeting.

Insert Table 6-3 about here

Discussion

Analyses of the average amount of time spent discussing various data domains, as well as the frequency with which various domains were discussed at individual meetings indicated that the student's classroom behavior was discussed most often. This was followed closely by discussions of the student's performance on achievement tests. Other domains of assessment information did not receive much discussion time in the placement team meetings. For example, discussion of the results of intelligence testing averaged about 7% of the meeting time (approximately 2 minutes); others (personality, perceptual-motor, psycholinguistic) each averaged considerably less than 5% (less than 1.5 minutes).

While these results, in part, support the findings of Poland et al. (1979) and others (see Chapter 2) regarding the importance of classroom performance and achievement test scores, they also indicate that the importance assigned to other assessment domains (especially, intelligence) is not reflected in the amount of time spent in discussion of those data. At this point, one can only speculate as to whether the quality of information presented is such that less time is needed to present data in these areas to have a significant influence on the decision (see Chapter 5).

CHAPTER 7

The Special Education Team Process: To What Extent is it Data-Based?

Linda Richey and Janet Graden

School personnel routinely collect a variety of information in order to make decisions concerning a child's eligibility for special services. Such decisions typically are made in placement team meetings in which individuals are expected to reach consensus as a group.

Decision makiers participating in placement team meetings are routinely exposed to various information on the basis of which decisions about a child are to be made. For example, scores on formal tests of intelligence and achievement usually are required by law, and informal data such as anecdotal statements concerning the child's classroom performance, behaviors, and socio-emotional adjustment are frequently presented (Thurlow & Ysseldyke, 1979). Additionally, naturally-occurring characteristics of the child (e.g., sex, socioeconomic status, physical appearance, race) also enter into the decision-making process (Adams & LaVoie, 1974; Ross & Salvia, 1975; Schlosser & Algozzine, 1979; Ysseldyke & Algozzine, 1979). The conglomerate of information that is presented in placement team meetings is used to satisfy requirements for placement under PL 94-142 and/or various other criteria used by school districts for placement of exceptional children (Federal Register, 1977).

Surveys of special education directors (Poland et al., 1979) and Child Service Demonstration Centers (Thurlow & Ysseldyke, 1979) across the nation indicated that a vast number and variety of assessment devices

are used to collect data for team meetings (cf. Ysseldyke, Mirkin, Thurlow, Poland, & Allen, in press). Information on the assessment devices used to collect data for team meetings from CSDCs, Nebraska teams, and a sample of teams in three states were presented in Table 2-3. As was indicated, large numbers of tests are reported to be used to collect information for team meetings. The number of different devices used suggests that tests are not used consistently across team meetings; however, there are tests that are used more frequently than others. The PIAT was among the top five tests for all three sample, while six other tests (Beery, Key Math, PPVT, Slosson, WISC-R, and WRAT) were among the top five in two of the three samples. All of these tests were either intelligence or achievement tests except the Beery, which is a perceptual-motor test.

In a computer-simulated study of the decision-making process (Ysseldyke, Algozzine, Regan, Potter, Richey, & Thurlow, 1980), various professionals (e.g., school psychologists, special ed. teachers, administrators, classroom teachers, support personnel) were required to select assessment devices in order to make outcome decisions about a child. Forty-nine separate devices from a variety of domains (e.g., intelligence, achievement, perceptual-motor) were selected by the 159 participants. Devices used most frequently were the Wechsler Intelligence Scale for Children-Revised (WISC-R) and the Bender Visual-Motor Gestalt Test.

From the results of these studies, it becomes clear that educational personnel report the use of a vast number and variety of assess-

ment devices in the decision-making process. The extent to which data presented in placement team meetings are actually related to the eligibility decisions that are made is presently unknown. The purpose of this investigation was to determine the kinds of data that are presented in team meetings and the extent to which these data are related to the eligibility decisions that are made.

Method

Subjects. Team meetings that were held for the purpose of making an eligibility decision concerning the child (N = 20) were selected for review. From these 20 videotapes or transcripts of the tapes, statements that were directly related to the child or his/her eligibility for special class placement were recorded on summary sheets.

Observation system. Statements concerning procedural matters, referral process, or generally irrelevant discussion were not included. Recorded statements were entered into one of two categories: (a) statements related to expected level of performance (e.g., current grade placement, expected grade level, age), and (b) statements concerning actual level of performance (e.g., obtained scores, observational measures, statements of attitudes). Examples of statements that were tabulated in each category are presented in Table 7-1.

Insert Table 7-1 about here

Also of interest was the extent to which the data presented at the meeting were supportive or nonsupportive of the decisions made at the

meeting. Subsequent to the initial data tabulation, each statement was coded relative to the extent to which it would support (coded +), refute (coded -), or be irrelevant (coded 0) with respect to eligibility for LD services under three conditions. Additionally, the name of each device or unit of assessment information was tabulated.

The three eligibility criteria for learning disabilities were selected on the basis of either legal requirements or accepted use in the field (Bersoff & Ysseldyke, 1977; Federal Register, 1977; Mercer, Forgnone & Wolking, 1976). The final criterion for learning disabilities was the placement team's actual decision; in other words, whether the child was declared eligible for learning disabilities services was recorded and used as a decision criterion.

The first definition employed the commonly used criterion of a discrepancy between actual achievement (usually measured by achievement tests) and ability (as measured by intelligence tests). The second was based upon significant verbal/performance discrepancy between an obtained Verbal IQ on the Wechsler Intelligence Scale for Children - Revised (WISC-R) and the obtained Performance IQ on the WISC-R; this criterion is used frequently by placement teams in determining learning disability eligibility and follows from the continuing tradition of the early learning disabilities emphasis on intra-individual differences. The final criterion used was the current federal definition of learning disabilities. Examples of statements coded relative to each eligibility criterion are presented in Table 7-2.

Insert Table 7-2 about here

Reliability. Statements were analyzed from either videotapes or transcripts by two observers who also determined which statements were related to the LD criteria of interest. Interrater agreement with respect to the question of whether data supported at least one of the pre-selected criteria for eligibility was calculated for all 20 tapes. The resultant reliability was considered adequate ($r = .95$).

Results

Data presented. Scores for the WISC-R and PIAT were reported most frequently during the meetings; over 45 specific tests or scores on them were mentioned at least once. The number of tests mentioned and scores reported for each meeting are presented in rank order in Table 7-3; also indicated is the decision made at the placement team meeting in which the data were presented. The relationship between the amount of data presented and the final decision was moderately high ($r = .52$); the more test information presented, the more likely the decision was to classify the youngster as LD.

Insert Table 7-3 about here

Nature of data presented. The child was declared eligible for services by 70% (i.e., 14 of 20) of the placement teams. Eighty-three percent of the statements made at these meetings were considered irrelevant to the

decision. The remaining statements were coded as supportive or nonsupportive of the decision; 5% were nonsupportive. The tabulation of supportive data statements is presented in Table 7-4 relative to each of the eligibility criteria used; the relationship between the nature of the data presented and the placement team decision was evaluated. No relationship was indicated between presentation of statements relevant to ability/achievement discrepancies, verbal/performance discrepancies or federal definition criteria and the placement team decision ($r = .29, .28, -.13$ respectively, $p > .05$).

Insert Table 7-4 about here

Discussion

It might be expected that assessment data presented at placement team meetings would be relevant to the outcome decisions made by the team. We observed that considerable data are presented, and attempted to relate those data to the decisions made. Of the 20 students about whom meetings were held, 14 were declared eligible for learning disability services. Yet, the data presented at the meeting were not significantly related to three commonly used definitions of LD. The data did not support the belief that teams use specific (or formal) criteria in making eligibility decisions, nor that assessment data are used to support or refute eligibility. It may well be that eligibility decisions are made in spite of data either supportive or nonsupportive of the decision.

CHAPTER 8

Participation of Regular Education Teachers in Special Education Team Decision Making

Donald Allen

The regular classroom teacher is an important participant in the special education team meeting, and plays an essential role in making both placement and educational program decisions. Generally, special education teams meet for the purpose of making decisions about potential changes in a student's educational setting (i.e., classroom or school) or in a student's instructional program. It is specified in Public Law 94-142 that the teacher be a participant in multidisciplinary team meetings held for either evaluation (Section 121a.540) or program planning (Section 121a.344). The law states (Section 121a.550) that students may be placed in special education settings only when "education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily." The law further requires placement teams to "draw upon information from a variety of sources, including...teacher recommendations" when interpreting data to make a placement decision.

The regular classroom teacher is assumed to be a valuable source of information in decision making, providing assessment information and behavioral observations, data on pupil performance and progress, and specific data on the nature of interventions that are and are not effective with the student. The participation of regular classroom teachers is essential when the decision is made to leave students in regular classes and to make changes in the student's educational program. The

teacher is the one who must implement the program. Recent research on team decision making indicates that teachers are more satisfied with decisions in which they participate (Cooper & Wood, 1974; Yoshida et al., Notes 6 & 7). Bass and Leavitt (1963) found that, other things being equal, people are more likely to carry out decisions which they made or helped make.

Several recent investigations of the placement team decision-making process have addressed the participation of regular classroom teachers in the process. Poland et al. (1979) reported the results of a survey in which they asked directors of special education to describe aspects of the special education team decision-making process. Directors were asked to name by role those persons who typically attended special education team meetings held for the purpose of making screening, placement, and instructional planning decisions. Regular classroom teachers ranked first (82%) in attendance at meetings where screening decisions were made, fifth (78%) in attendance at meetings where placement decisions were made, and third (72%) in attendance at instructional planning meetings. While attendance does not connote participation, regular classroom teachers reportedly do attend special education team meetings. Yet, when directors were asked which professionals <u>should</u> participate in placement team meetings, they identified regular classroom teachers first (79.8%), followed by special education teachers (71.7%), school psychologists (60.6%), principals (27.3%), and directors of special education (24.2%). Clearly, at least as viewed by directors of special education, the

participation of regular classroom teachers is seen as very important.

A major investigation using self-report methodology was completed by personnel in the Bureau of Education for the Handicapped and reported in a series of research reports and monographs (Fenton et al., Note 1; Fenton et al., 1979, Notes 2-4; Yoshida et al., 1978a, 1978b, Notes 5-7). They used a questionnaire to survey team members in Connecticut, investigating team members' participation, satisfaction, recognition of goals, and role expectation. Yoshida et al. (1978a, Note 6) investigated the relationship between perceived participation and perceived satisfaction, reporting that while role is positively related to participation, and participation to satisfaction, there was little relationship between role and satisfaction. Appraisal personnel (school psychologists, social workers, counselors) and administrators reported that they participated in decision making more often than did regular or special education teachers. Regular education teachers perceived themselves as low both in participation and satisfaction with the team decision-making process. Yoshida et al. (Note 6) stated that "Regular education teachers, who are pivotal persons in operationalizing and implementing the PT (placement team) decisions, are low in participation, and generally not satisfied with the process" (p. 13). They concluded that "clearly, instructional personnel appear to be the most disenfranchised from the process, despite the fact that they are the individuals most responsible for implementing PT decisions" (p. 13).

Goldstein et al. (1980) used naturalistic observation to record the percentages of time that team members, by role, spent discussing the child,

with categories recorded being curriculum, behavior, evaluation, personal/family, and performance. Classroom teachers spent the greatest share of their time (47%) discussing the behavior of the child, followed by discussing curriculum (24%) and child performance (14%). Goldstein et al. did not report the actual extent of teacher participation relative to other team members.

The purpose of this study was to observe the special education team decision-making process as it occurred in the natural environment, and to record both the extent and nature of participation by regular classroom teachers. Following observation, teachers were asked the extent to which they were satisfied with the outcome of the meeting. Four specific research questions were addressed:

1. How often is information elicited from or presented by regular education teachers?
2. What kinds of information (e.g., classroom observations, test scores) are presented by regular education teachers?
3. What kinds of information (e.g., recommendations) are elicited from regular education teachers?
4. What is the relationship between the extent of teacher participation and their satisfaction with the outcome(s) of the meeting?

Method

Subjects. The tapes of 24 special education team meetings were used as the unit of analysis for this study. Other meetings in the original videotaped set were eliminated, either because no teacher was present or because the tapes were of poor quality. Of the 24 meetings, two were in

urban schools, 11 in rural schools, and 11 in suburban schools in Minnesota. Meetings varied in length from 5 to 57 minutes with an average length of 31 minutes. Team size ranged from 6 to 16 members ($\bar{X}$ = 7.4). Parents were present at 14 of the meetings.

Observation system. An interval method of recording was used to collect data on teacher participation. Participation was coded if a teacher spoke at all during a 10 second observation span. (The total number of data-collection intervals was 4,320.) Utterances (e.g., "uh huh," "right," or "yes") that occurred while someone else was talking, were ignored. Data were collected on regular classroom or regular education teachers only; in meetings where more than one classroom teacher was present, data were collected on each individually. Teacher participation was coded into one of four mutually exclusive categories.

Categories. Any description of a child's actual behavior was recorded as a classroom item; statements about various types of classroom behavior (e.g., social, academic, attendance) were coded. Assessment information was coded as a test item; discussion of test scores or interpretation were recorded in this category. Any statements about program, placement, or curriculum changes were recorded as a recommendation item; general, nonspecific comments of a recommending nature were not coded. Examples of teacher responses for each of these observation categories are presented in Table 8-1. All teacher comments that could not be coded in any of the three main categories were recorded as other items.

Insert Table 8-1 about here

The primary units within the system were divided among items which dealt with student characteristics (classroom or test behaviors), teacher recommendations and other subjective or irrelevant comments. One additional item of information was collected from analysis of the tapes. A frequency count of how often information was elicited from the teacher was also tabulated. This count had a very liberal inclusion rule. Any statements made eliciting information from the group, that the teacher responded to, were counted.

Reliability. Interrater agreement between two observers was evaluated for information from 6 of the 24 meetings (25%). These reliabilities were computed by tallying the number of intervals each observer coded (within each category) and dividing the smaller total by the larger. The mean levels of agreement for each category across the six meetings were classroom, .86 (range: .75 - 1.00); test, .93 (range: .75 - 1.00); recommendations, .67 (range: .50 - 1.00); other, .82 (range: .75 - 1.00); and, number of eliciting comments directed at teacher, .78 (range: .50 - 1.00). The mean levels of agreement on the category of recommendations and the frequency count of eliciting statements both fell below the a piori criterion level of .80. This is mainly due to their extremely low occurrence. For example, if only one recommendation was made by the teacher during a meeting, one observer may have coded it during only one interval while the second observer may have coded it as carrying over to a second interval. A simple disagreement such as this then resulted in a reliability of only .50. Although the reliabilities computed for these

categories preclude discussing the relative values obtained from the tapes, the low (or non-) occurrence of recommendations or eliciting comments is, in itself, relevant.

Results

The average amount of participation by teachers in these placement meetings was 27%; however, individual teacher participation ranged from 3% to 82% (participation values indicate the total percentage of observed 10 second intervals during which the teacher spoke). The mean number of comments or questions made by others eliciting information from the teachers was six comments per meeting; however, again, the per meeting range was considerable (1 to 23). The majority of the teachers' participation in these meetings dealt with classroom data (43%) or subjective/irrelevant (other) information (47%); very little time (10%) was spent by teachers discussing test information or their recommendations regarding placement. The eliciting comments (or questions) made by others followed a very similar pattern. Most fell under the "classroom" or "other" categories. In the 24 meetings only nine times did members elicit information from the teachers regarding test information or their recommendations. The percentages of each category of participation observed during the placement meetings are presented in Table 8-2 for teacher presented or elicited information.

Insert Table 8-2 about here

Results of the regular education teachers' responses to post-meeting questions (see Chapter 10) indicated satisfaction with the process. All teachers either agreed or strongly agreed with the statements: (a) I am satisfied with the outcome of this meeting, (b) My presence at the team meeting was necessary, and (c) the team approach is an effective way to make decisions about students. However, 64% of the teachers disagreed with a statement suggesting that their view of the child had changed as a result of attendance at the team meeting; 13% indicated their views had changed and 23% had no opinion relative to the item.

Discussion

Teachers were found to participate (talk) in 27% of the observed intervals during placement team meetings. Although this may seem like an acceptable amount of participation by the teacher, it should be noted that this is an average value. In seven of the meetings, teachers participated in less than 10% of the observed intervals; often this meant less than 60 seconds of talking. Certainly this should be viewed as less than desirable participation by the classroom teacher.

Considerable variance was also evident in the extent to which test information and recommendations were discussed by the teacher. Test data and recommendations were not discussed by teachers in over 67% of the meetings (not necessarily the same meetings). It appears this information is not being offered by the teacher because no one is requesting or eliciting it; for example, although some comment (or question) was made at least

once in every meeting to elicit information (participation) from the classroom teacher, test information was elicited in only two meetings and recommendations for placement in only three of 24 possible meetings. The data obtained in this naturalistic study support the earlier self-report findings of Yoshida et al. (Note 6), with one exception. Even though participation was often low, teachers were satisfied with meeting outcomes.

No relationship was observed between extent of participation and satisfaction with the outcome of the meeting. All teachers reported satisfaction with the outcome of the meeting; however, only 13% agreed that their views had changed significantly as a result of their participation.

From these data it appears that meetings are being held in which teachers either are not participating or are doing so in a very superficial manner. Even in those meetings where teachers are participating, some very important types of data are not being offered; specifically, information from teacher-administered tests and teacher recommendations for educational placement are seldom presented or requested.

CHAPTER 9

Generation of Intervention Statements by Decision-Making Teams in School Settings

Stephen Poland and Jean Mitchell

An important aspect of educational decision making involves formulating plans for interventions and/or special treatments that are justified by the results of a psychoeducational assessment. The decisions that lead to the development of the plan of services are no longer the primary responsibility of one or two professionals; instead a multidisciplinary team shapes the decision. A central goal of the placement team decision-making process, then, is the formulation of a plan detailing the educational services to be provided the student. Decision-making teams may differ in the strategies they utilize to generate educational service options for a student.

In this study an observational system was developed to evaluate the kinds of intervention statements made during team meetings as well as the roles of team members initiating them. Intervention statements were defined as those that describe a future course of action concerning a student's educational needs. The observational system was applied to intervention statements from a set of meetings to answer the following questions:

(a) What is the nature of the intervention statements made in team meetings?

(b) Which individuals are most active in initiating these statements?

Method

Subjects. Data were collected from 14 meetings conducted after assessment data had been collected and when the team was at the point of bringing this material together to plan an intervention. In those cases where a school had a series of meetings concerning the placement of children in a single program, only one meeting of the series was included in the analysis to ensure that the results were not overly affected by team procedures in a single setting. In the single case where more than one meeting was available on the same child, only the meeting with the parent present was included in the sample.

For each of the meetings, the intervention statements on the transcript were recorded verbatim. A classification system was applied to these statements and a tally kept of the number of intervention statements in each category and the roles of the individuals who made the statements. Four of the meetings were coded independently by two observers and the resulting codings compared to assess interrater agreement.

Observation system. Intervention statements were defined as statements that described action to be taken at some future point concerning the student's educational programming; included were the methods and the goals of the planned program. The transcripts of three meetings were reviewed and all the statements that met the general definition of an intervention statement were recorded verbatim. From a review of these statements a number of categories were defined into which intervention statements could be sorted.

Categories. Further refinement of the system led to the definition

of seven categories. These included identifying service options and levels of service as well as defining treatment goals, indicating a need for further evaluation or program review, specifying the length of service, and making general recommendations to the parents. Table 9-1 lists each category, its definition, and examples of statements included. In the analysis of results, the information included in the category level of service was used to describe the precise nature of the service option the team planned for the student; it is not reported as a separate category.

Insert Table 9-1 about here

Reliability. Interrater agreement was assessed using two procedures. The first assessed the agreement between observers on the content of the intervention statements made in each category. For each category, the number of statements classified identically by the two observers was divided by the total number of statements that the observers placed in that category. The average agreement by category for the four meetings is presented in column one of Table 9-2. When measured in this manner, agreement ranged from a high of .87 (service options) to a low of .38 (parent recommendations).

Insert Table 9-2 about here

The second procedure rated the agreement between observers on the roles of the team members who initiated intervention statements in each category. The number of individuals the observers agreed made one or

more statements during the meeting was added to the number of individuals they agreed did not make such statements. This total was divided by the number of individuals who attended the meeting. The average agreement across the four meetings is presented in column two of Table 9-2. Higher interrater agreement was obtained using the second procedure than was obtained from the first, suggesting that the observers were in closer agreement about the individuals who made intervention statements than they were in determining the frequency of the content of the statements made.

Results

Service options. Only the team members who first mentioned a service option were included in this analysis. Initiation of a service option does not necessarily mean that the team member advocated it for the student. For example, service options could be introduced in the form of a question or in a way that tended to rule them out from further consideration. The service options discussed may be arranged in five levels: those involving minimal change in the existing program (e.g., retain child in existing program), those involving intermediate levels of change in provision of additional services to the regular classroom (e.g., classroom aide), and those involving the provision of services by special education staff outside of the normal classroom setting for some portion of the day (e.g., LD program for 20 minutes each day).

Meetings varied in the range of options discussed; in some, all the options involved provision of services at the special class level, while in others less intensive services were discussed either as alternatives to services at a more "intensive" level or as supplemental to

such service. Nearly half of the options initiated in the meetings (N = 21) involved provision of part-time self-contained special class placement. The next most frequently mentioned options were at the least intensive level of service (regular classroom with minimal or no modification). There were considerably fewer options initiated that involved the intermediate levels of service such as consultative assistance to the regular classroom teacher or the services of an itinerant specialist.

The number of service options discussed at meetings varied from one to five ($\bar{X}$ = 3.1; SD = 1.6). It was possible for the child to receive more than one service option since many were not mutually exclusive. The number of service options finally decided on by the team ranged from one to three ($\bar{X}$ = 1.5, SD = 0.2). There was little relationship between the number of options discussed at the meeting and the number adopted (r = .50). What seemed to be more important was the extent to which service options discussed in the meeting were distributed across the range of available options. For example, in those meetings where a number of the options discussed were part-time placement in self-contained classroom settings, only one of these options was adopted, no matter how many had been discussed. Representative data for analyses of service option discussions are presented in Table 9-3.

Insert Table 9-3 about here

The numbers of service options presented by various team members are presented in Table 9-4; also indicated is the frequency of attendance

by various professionals. Two of the options were read from reports presented at the meetings; the community psychologist and the occupational therapist who made these suggestions were not actually present at the meeting. The roles most frequently represented in these meetings were the regular teacher, the school psychologist, and the parent; those infrequently represented included the special education supervisor, the reading teacher, and the health coordinator. The largest number of options were initiated by the psychologist and the principal while members in other roles such as the health coordinator and the reading teacher did not initiate any.

Insert Table 9-4 about here

In order to measure the activity by role of team members in initiating service options it was necessary to account for the fact that individuals in some roles were present much more frequently at meetings and had more opportunities to initiate options than those in other roles. Only roles that were represented by at least five individuals were included in the following analysis. A measure of activity was computed for members in each role by dividing the number of options they initiated by the frequency of their attendance across the 14 meetings. For example, since five resource teachers were present at the meetings and they initiated four options the ratio is .80 (4/5). These activity ratios are presented in the right-hand column of Table 9-4. As measured by this ratio, the members who were most active were the special education teachers (resource teacher, learning disabilities, SLBP), the principal, and the school psychologist, while the least active members were the

parent, the regular classroom and the Title I teachers.

In order to assess the extent to which team members initiated options associated with the services they delivered, seven team roles were identified that matched a service option initiated in one or more of the meetings (e.g., learning disabilities teacher with learning disability services). A record was kept of the service options initiated by members in each of these roles and a count made of the options they initiated that matched their role as compared with the number of options they initiated that did not match. This information is presented in Table 9-5. Examination of this table suggests that some team members frequently mentioned service options associated with their own speciality. This could be contrasted with some other team members, such as the principal and the school psychologist, who could not be matched with service options and who tended to suggest a wider range of options.

Insert Table 9-5 about here

Goals and methods. Statements about desired outcomes or ways to achieve outcomes were the most frequent kinds of intervention statements made in the meetings; more individuals were involved in making them than any other kind of intervention statement. There was considerable variation across meetings in the number of team members who initiated one or more of these statements. For example, in one meeting a single person initiated all goals/methods statements, while in another meeting seven out of nine individuals initiated them. In half the meetings at

least 50% of the members initiated one or more of these statements.

A measure of the activity, by role, of team members in initiating goals and methods statements is presented in Table 9-6. Analysis was confined to those roles for which five or more individuals were present over all meetings. The number of individuals in each role who initiated one or more goal and method statements was compared to the number of individuals in that role across all the meetings. The most active members, as measured in this fashion, were the school psychologist and the SLBP and learning disabilities teachers. In contrast with their role in generating service options, the parent and the regular teacher were more active than the principal in generating goal and methods statements.

Insert Table 9-6 about here

There was considerable variation between meetings in the number of goal and method statements that were made. The fewest recorded in a single meeting was two, while the most was 39. Meetings in which the fewest goal and method statements were initiated were those in which: (a) decisions regarding service options were deferred, (b) special education service was denied, or (c) a temporary program, such as a limited period of diagnostic teaching, was planned. A high incidence of goal and method statements seemed to be associated with factors such as the presence of parents who actively participated in the meeting and the completion of the individualized educational plan form by a staff member while the meeting was in progress.

Further evaluation. In eight of the meetings, statements regarding

the need for further evaluation of the student were made by participants. The team member most active in the formulation of these statements was the school psychologist.

Timing. In 13 of the 14 meetings at least one person in the meeting initiated a statement about the timing of the program. There was considerable variation among meetings in how detailed the specifications were regarding the timing of the service options to be delivered and scheduling of program review.

Periodic program review. In 11 of the meetings at least one of these statements was made by the participants. The four individuals across all the meetings who were most involved in initiating statements regarding program review and timing were the principal, the school psychologist, the supervisor of special education, and the learning disability teacher.

Recommendations to parents. Few of these statements were made in meetings; in only five of the 10 meetings in which parents were present were such statements made. No team role was differentially involved in the making of such statements.

Discussion

Most of the intervention statements made in the meetings could be classified into a relatively small number of categories. They included: (a) discussion of the type and level of services a school might provide a student (such as part-time placement in a learning disabilities classroom or the services of a volunteer to tutor the student in math), (b) the instructional methods to be utilized and the goals toward which the services were directed, (c) the timing of the proposed program, (d) the

provision of periodic review, (e) the area in which further assessment data were needed, and (f) the activities that parents could perform to support the program of services planned for the child at school.

The range of service options discussed at meetings came from the less restrictive portion of the special education cascade (cf. Deno, 1980) and did not include placement in a self-contained special education classroom on a full-day basis or intensive services out of the school setting. This is not surprising since meetings concerning children suspected of being mentally retarded or who were severely physically handicapped were not included in the sample of meetings videotaped.

The activity of team members in initiating intervention statements varied both as a function of their role and the type of intervention statement being made. Individuals such as the principal, the special education teacher, and the school psychologist were much more actively involved in proposing service options than the regular education teacher and the parent. However, when the activity involved the initiation of goal and methods statements, the parent and regular education teacher's level of participation increased considerably, although it remained at a lower level than that of many other team members. For some types of intervention statements, participation was limited to individuals in a few roles, such as school psychologists and special education teachers.

It was also apparent that some team members initiated service options associated with their specialty (e.g., the learning disability teacher recommended a learning disability placement) while other team members, such as the principal and the school psychologist, initiated a wider range of service options. In most cases, the school psychologist

also initiated discussion regarding further evaluation, intervention timing, and periodic program review.

Care must be taken in interpreting the results of this investigation. The initiation of intervention statements does not exhaust the range of activities in which team members may engage during a meeting. For example, most teams spend considerable time presenting and evaluating assessment data. Thus a member's activity in initiating intervention statements does not necessarily reflect the overall level of activity of that member in the meeting. The small sample size (N = 14) and the diversity of meeting formats limits the generalizability of the results to practice in school settings in general. However, the results have suggested some directions for further research. For example, it would be useful to describe the meeting formats and leadership styles that are associated with low or high levels of participation by team meetings.

What implications do these results have for the conduct of team meetings in school settings? First, we suggest that it may be useful for teams to become more aware of their activities, such as the initiation of intervention statements. As awareness increases, teams can assess the degree to which participants in different roles (e.g., parents and regular classroom teachers) generate these statements. If there is concern that the amount of participation in some roles is overly restricted, participation may be increased through efforts such as providing more background information and attending to team dynamics that may impede participation. The team may wish to examine the process they utilize to generate and evaluate service options. It may be possible to generate a wider range of options by clearly separating the generation from the evaluation of options.

CHAPTER 10

Views of Placement Team Members Subsequent to Their Participation in Meetings

Martha L. Thurlow

Since the enactment of PL 94-142, school personnel have engaged in a team meeting process to ensure that all handicapped children receive appropriate educational services. The goal of such team meetings is to assure that decision making is both fair and appropriate (Ballard & Zettel, 1977).

The team meeting process appears to be of special concern to educators, especially in terms of the mechanics of implementing the process in the schools (Poland et al., 1979). Similarly, there has been increased focus in the educational literature on the team meeting process (Fenton et al., 1979; Goldstein, et al., 1980; Hoff et al., 1978; Holland, 1980; Patton, 1976; Walker, 1976; Yoshida et al., 1978a, 1978b, Note 5), and on the factors that influence that process (Matusek & Oakland, 1979; Morrow, Powell, & Ely, 1976; Poland et al., 1979; Thurlow & Ysseldyke, 1980; Ysseldyke, Algozzine, Regan, & McGue, 1979).

In a recent review of the literature and report of a field survey, Holland (1980) concluded that "the decision-making processes in the screening, assessment, placement, and monitoring of special education students are similarly complex despite demographic differences" (p. 552). Clearly, additional research efforts are needed to untangle the web of factors impinging on the team decision-making process. One approach to looking at the team meeting is to obtain information from those par-

ticipating in such meetings. While this approach has been used by several researchers, typically it has been limited to the investigation of one or two variables of interest.

The present research used a survey approach to obtain information from team meeting participants at the conclusion of team meetings. The survey was designed to sample an array of information, in order to develop a generalized picture of the team meetings, as seen through the eyes of the participants in the meetings.

Method

Subjects. Subjects were 155 individuals participating in school team meetings that were videotaped for research purposes. Members of all videotaped meetings were included; the meetings are described in Chapter 3.

Materials. A one-page survey form was used to obtain information on each participant's role, team activities, preparation time, reactions to the meeting, factors that influenced the meeting's outcome, and professionals who would be selected to participate in meetings. A copy of the survey is included in Appendix D.

Procedure. At the end of each team meeting, participants completed the survey form. Completion of the form required approximately five minutes.

Results

Meeting participants. The role of each individual in the team meeting was obtained for 154 subjects (see Table 10-1). Clearly, a variety of individuals were included in the team meeting samples. The roles represented most frequently were the regular teacher (27.9%) and

the LD teacher (22.7%), followed by the principal/administrator (13.0%), and the school psychologist (10.4%).

Insert Table 10-1 about here

When these individuals were asked to list the four professionals that they would include on a placement team meeting limited to four professionals as well as the parents, subjects included a variety of roles. These data are presented in Table 10-2. Each of the roles represented in the meeting was listed at least once as being a desirable member of the hypothetical placement team. On the average, the most frequently included professionals were the regular teacher (24.7%), the LD teacher (21.9%), the school psychologist (19.2%), and the principal/administrator (12.2%). These results are similar to those indicated by analysis of actual participants.

Insert Table 10-2 about here

Preparation time. Subjects were asked to indicate (a) the amount of time spent collecting information on the child for the meeting, and (b) whether the amount of time was inadequate, adequate, or excessive. Only 37 individuals estimated the amount of time spent collecting information for the meeting. The preparation time listed by these individuals ranged from two minutes to 540 minutes, with the median time being 95 minutes. The modal amount of time was 60 minutes. Only 13.5% of the subjects responding to this item indicated that less than 30 minutes was spent collecting information on the child.

The adequacy of the time spent collecting information was rated by 129 subjects (83.2%). The majority of these subjects rated the time spent as being adequate (90.7%). Only 2.3% indicated the time was inadequate; 7.0% indicated the time was excessive.

Team activities. Subjects were asked to indicate whether they participated in six types of activities during the team meeting: (a) presenting data, (b) interpreting information, (c) commenting on data presented by others, (d) proposing alternative outcomes, (e) evaluating alternative outcomes, and (f) discussing the final outcomes. A summary of the responses to this item is presented in Table 10-3. The largest percentage of subjects (79.9%) indicated they commented on data presented by others. Only two types of activities were participated in by less than 50% of the subjects (proposing alternative outcomes - 45.4%; evaluating alternative outcomes - 39.6%).

Insert Table 10-3 about here

Subjects also were asked to rank the activities according to the amount of time spent personally in each activity, where a rank of 1 represented "most time," 2 indicated "next most time," and so on. As shown in Table 10-4, subjects clearly indicated that most of their time was spent in presenting data (48.4%), followed by commenting on others' data (18.7%). Very few individuals indicated that most of their time was spent in evaluating alternative outcomes (3.2%). It is notable that less than 10% indicated that most of their time in the meeting was devoted to interpreting data (8.6%).

Insert Table 10-4 about here

Factors influencing the meeting's outcome. Subjects were asked to rate the effect of 17 factors on the outcome of the team meeting in which they had participated. Each factor was rated using a scale that ranged from 1 (no effect) to 5 (very significant effect). The mean ratings given to the 17 factors are presented in Table 10-5.

Insert Table 10-5 about here

Data-related factors generally received ratings indicating a significant effect. The data factors rated as most influential were: (a) teacher reports of child's classroom achievement ($\bar{X}$ = 4.40), (b) information from child's parents/guardians ($\bar{X}$ = 3.70), and (c) child's scores on achievement tests ($\bar{X}$ = 3.68). The lowest ratings were given to: (a) medical information ($\bar{X}$ = 1.99), (b) child's scores on perceptual-motor tests ($\bar{X}$ = 2.53), and (c) child's scores on psycholinguistic tests ($\bar{X}$ = 2.84).

Factors reflecting institutional and external constraints generally were given lower ratings than the data factors. Availability of services received a mean rating of 3.64, indicating its effect was viewed as somewhere between moderate and significant. Both the teacher-child match and the child's school attendance record were given much lower ratings, indicating effects somewhere between insignificant and moderate.

Child characteristic factors were viewed as much less influential on the outcome of the team meeting, with the highest rating (yet, still "insignificant") assigned to the power of the child's parents in the

school system ($\bar{X}$ = 1.90). The mean rating for the child's sex ($\bar{X}$ = 1.29) and race ($\bar{X}$ = 1.18) approached the "no effect" level.

Nine subjects indicated that "other" factors had an effect on the outcome of the team meeting. Included among these factors were availability of services, past experiences with child, and diagnostic teaching results.

Subjects also were asked to identify, from among all data presented at the meeting, those data that were most useful in making decisions. Of the 107 responses to this item, most (82.2%) were to factors other than those presented in Table 10-5. Generally, the responses referred to classroom performance and behavior of the child, without specifically indicating whether the data were from teacher reports, informal measures, or observations. Of the factors included in Table 10-5, teacher reports of the child's classroom achievement were viewed as most useful.

Reactions to the meeting. Subjects were asked to respond to four statements designed to obtain information about their reactions to the meeting in which they had participated. The statements to which they responded were:

> I am satisfied with the outcome of this meeting.
>
> My view of this child changed significantly as a result of attending this meeting.
>
> My presence at this meeting was necessary.
>
> The team approach is an effective way to make decisions about students.

Each statement was rated on a Likert-type scale, ranging from strongly disagree to strongly agree.

The subjects' responses to these items are presented in Table 10-6.

An analysis of the results indicated that the meeting participants generally were satisfied with the outcome of the meeting, felt their presence at the meeting was necessary, and viewed the team approach as an effective way to make decisions about students. The percentages of subjects "agreeing" or "strongly agreeing" to these statements were 96.3%, 93.3%, and 97.3%, respectively. In contrast, there was considerable variability in subjects' responses to the statement that their opinion had changed as a result of attending the meeting: 44.2% disagreed or strongly disagreed, 32.9% agreed or strongly agreed, and 22.8% had no opinion.

Insert Table 10-6 about here

Discussion

The overall picture of the team meeting painted by the survey information collected at the conclusion of such meetings appears to be one of considerable consensus. Specific individuals appear to participate in the meeting, specific activities seem to dominate such meetings, and specific factors seem to influence the outcome of the meeting. Further, participants seem generally to be satisfied with the decisions reached as a result of the team meeting process.

The finding that regular class teachers, LD teachers, and school psychologists were the most frequent participants in the team meetings agrees with data obtained from Child Service Demonstration Centers (Thurlow & Ysseldyke, 1979) and from special education directors (Poland et al., 1979). The data from Thurlow and Ysseldyke (1979) and Poland et al. (1979) were from nationwide surveys, thus supporting the generality of the findings from the present survey. These data, however, are in contrast to those presented by Goldstein et al. (1980), where classroom

teachers were present at fewer than half of the IEP conferences they surveyed.

Apparently, meeting participants are satisfied with the composition of the teams, for when asked to list the four professionals they would want included on a placement team meeting, they listed the same professionals, in approximately the same proportions, as were represented on the actual teams.

As noted by directors of special education (Poland et al., 1979), the team meeting process is a time consuming one. In support of the conclusions of Price and Goodman (1980), the present survey found that more than one hour is spent in preparing for the meeting, which in itself typically takes about one hour (Poland et al., 1979). It must be noted, however, that in the present survey, only 24% of the subjects were willing to estimate the amount of time they had spent preparing for the meeting. One might hypothesize either that they spent so little time they did not want to document it, or that they did not monitor their activities in terms of a time variable, thus they were unable to make an estimate.

Despite the unwillingness of meeting participants to estimate preparation time, nearly all (83.2%) were willing to judge the adequacy of the time spent. Overwhelmingly, the subjects indicated that the time spent was adequate; only 7% suggested that the amount of time spent in preparation was excessive. This picture is in contrast to the one presented by special education directors, who identified time and scheduling as a major problem in the team meeting process (Poland et al., 1979).

Team member participants further indicated that they engaged in a range of activities during the meeting. Most individuals participated by presenting data or by making comments on data presented by others.

Less than 50% of the participants indicated that they spent time proposing or evaluating alternative outcomes. Such findings are somewhat consistent with Patton's (1976) conclusion that only about five minutes were actually spent in making a decision about a child during a placement team meeting.

The factors that were viewed as influencing the outcome of the team meeting the most (especially, achievement information and information from parents/guardians) have been reported by others also (Matusek & Oakland, 1979; Poland et al., 1979; Thurlow & Ysseldyke, 1980; Ysseldyke et al., 1979). The present data further indicate that availability of services is an institutional constraint that approaches the influence of parental information and achievement test scores.

Overall reactions to the meeting were positive. Participants generally were satisfied with the meeting's outcome and believed the team approach is an effective way to make decisions about students. Further, they believed themselves to be an important part of the meeting. The positive viewpoint expressed by these subjects is consistent with that found by Goldstein et al. (1980), where ratings of satisfaction with the IEP meeting ranged from 4.8 to 5.0 on a five-point scale. Of interest, however, is the finding of variability in responses to the statement: "My view of this child changed significantly as a result of attending this meeting." Over 65% of the meeting participants disagreed with the statement or had no opinion. It appears the meeting is not a place for making decisions, but rather for presenting information regarding decisions as the rationale for them.

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Footnotes

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[1]Teams in Nebraska were not observed or videotaped; team members completed the post-meeting questionnaire only. The data presented here are based on a first analysis. They have not been published or reported elsewhere.

[2]Teams in Minnesota, Arizona, and California were not observed or videotaped; team members completed the post-meeting questionnaire only. The data presented here are based on a first analysis. They have not been published or reported elsewhere.

[3]One team meeting was from Fargo, North Dakota.

[4]Although there are provisions in the federal legislation for participation by the student in special education placement and planning meetings, none of the meetings from which we collected data included students. Thus, no data are presented on student participation.

Table 1-1

Percentage of PTs Indicating that the Model Activities are Appropriate or Usual PT Behavior[a]

Usual PT Behavior		Appropriate PT Behavior	
Activity	Percentage of PTs with non-specialized participation	Activity	Percentage of PTs with non-specialized participation
	Perceiving the Problem		
Contributing information	.90	Presenting information	.65
Interpreting information	.43	Interpreting information	.45
	Exploring Alternatives		
Proposing alternatives	.25	Suggesting student's needs	.15
		Using needs as guidelines	.52
		Suggesting methods	.12
	Seeking a Solution		
Evaluating alternatives	.35	Finalizing decisions	.12
Participating in making decisions	.65	Setting evaluation criteria	.00
		Setting data for review	.05
		Assigning implementation responsibility	.05

[a]Table is from Fenton, Yoshida, Maxwell, & Kaufman (Note 4).

Table 1-2

Major Findings of the Study by Applied Management Sciences[a]

- Besides federal regulations, there was little written guidance concerning the placement process. Most localities seemed to have developed their procedures through the course of natural evolution rather than as a result of standard policy.
- Rarely was more than one option considered when determining a child's placement.
- Categorical decisions were seldom in evidence. Placement appeared to be individually determined and based primarily on the child's academic and social needs.
- The placement decision was usually made by one or two individuals; it was not arrived at through a group decision-making process. Nevertheless, the final placement decision appeared to be the most appropriate and beneficial for the student.
- Determination of child's academic and social needs can be considered part of the IEP process, yet most written IEP's were developed after placement, at a separate meeting.
- Parents were not consistently in attendance at IEP meetings and when they were, they were often unable to contribute to the meeting.
- The IEP was viewed more as an accountability mechanism rather than as a useful tool for programming.
- The concept of LRE was not well understood and was generally conceived of as mainstreaming.
- In spite of confusion surrounding the meaning of LRE, in practice the key elements of this principle were employed in placement decisions.
- Most cases did not result in placement changes which altered the restrictiveness of the setting. Where a change occurred, there was a tendency to move students to less rather than more restrictive options.
- Although in most cases alternative options were rarely considered, cases resulting in movement to a more restrictive environment frequently gave serious consideration to more than one option before determining placement.
- Parents had a high rate of attendance at meetings. Students were infrequently involved, but did, in some cases, attend meetings.
- Parents appeared to be satisfied with the placement decision in an overwhelming majority of cases.
- School staff encouraged parent participation to a great extent: they made formal welcomes to parents, requested information on the child, and solicited parent reactions to the proposed placement. Parents, however, were not involved in the actual decision-making.
- Fiscal reimbursement formulae indirectly inhibit placements in least restrictive environments.
- Discrepant state and federal definitions of handicapping conditions created some difficulties in classifying and placing handicapped students.

[a]Source: Reprinted from the final draft report to BEH by Applied Management Sciences, entitled Study for determining the least restrictive environment (LRE) placement for handicapped students, November, 1979.

Table 2-1

Membership of Placement Teams

Team Member[a]	Directors[b]	CSDCs[c]	NE Teams[d]	Other Teams[e]
Parent	91	79	13	33
School administrator	89	71	22	67
LD specialist	62	76	--	67
Special education teacher	85	71	35	67
School psychologist	81	63	70	83
Regular education teacher	78	82	61	100
Speech/language/audiology specialist	68	55	22	33
Educational diagnostician	62	55	17	--

[a]Table reports only those members included by at least 50% of the subjects in any two samples.

[b]Numbers are percentages of 99 directors listing members. Overall, 34 different members were listed by the directors.

[c]Numbers are percentages of 38 CSDCs listing members. Overall, 30 different members were listed by CSDCs.

[d]Numbers are percentages of 23 team meetings at which role was represented.

[e]Numbers are percentages of 6 team meetings at which role was represented.

Table 2-2

Ratings of Factors Influencing the Team Decision[a]

Factor	Directors[b]	NE Teams[c]	Other Teams[d]
Type of Data			
Teacher reports of classroom achievement	4.38 (.65)	3.86 (.94)	4.48 (.74)
Information from parents/guardians	4.07 (.75)	2.83 (1.44)	3.66 (1.45)
Scores on achievement tests	3.93 (.78)	3.36 (1.32)	3.83 (1.01)
Observational data	3.65 (.73)	3.56 (1.24)	3.48 (1.30)
Teacher reports of social behavior	3.65 (.68)	3.16 (1.32)	3.74 (1.29)
Scores on intelligence tests	3.82 (.84)	3.42 (1.24)	3.88 (.72)
Scores on psycholinguistic tests	3.67 (.82)	2.88 (1.34)	2.91 (1.36)
Scores on perceptual-motor tests	3.84 (.80)	2.94 (1.44)	2.91 (1.27)
Medical information	3.85 (.84)	2.60 (1.40)	2.11 (1.10)
Institutional/External Constraints			
Availability of services	3.22 (1.25)	3.43 (1.31)	3.88 (1.08)
School attendance records	3.29 (.89)	1.71 (1.14)	2.51 (1.29)
Teacher-child match	3.12 (1.01)	2.68 (1.39)	3.14 (1.63)
Child Characteristics			
Parents' power in school system	2.04 (.97)	1.86 (1.27)	2.20 (1.02)
Socioeconomic status	2.07 (.91)	1.94 (1.29)	1.57 (.88)
Physical appearance	1.80 (.82)	1.71 (1.14)	1.83 (.98)
Sex	1.50 (.69)	1.10 (.53)	1.60 (.91)
Race	1.39 (.65)	1.06 (.44)	1.17 (.38)

[a] 1=None, 2=Insignificant, 3=Moderate, 4=Significant, 5=Very significant.

[b] Ratings are means and standard deviations based on responses of 99 directors of special education.

[c] Ratings are means and standard deviations based on responses of 77 team members in Nebraska.

[d] Ratings are means and standard deviations based on responses of 35 team members from Minnesota, California, and Arizona.

Table 2-3

Assessment Devices Used to Collect Data for Team Meetings

Sample	Number of Different Devices	Top Five[a] Devices	Percentage[b]
CSDCs[c]	152	WISC-R	64.1
		Key Math	59.0
		WRAT	59.0
		Informal	59.0
		PIAT	53.8
NE Teams[d]	29	PIAT	82.4
		Slosson	76.5
		Beery	58.8
		PPVT	47.0
		Key Math	41.2
Other Teams[e]	17	WRAT	85.7
		Beery	57.1
		PIAT	42.8
		PPVT	42.8
		Slosson	42.8
		WISC-R	42.8

[a]More than five devices are listed if other devices are listed with a frequency equal to that of the fifth device.

[b]Numbers reflect the percentage of each sample listing the test.

[c]Sample included 39 CSDCs.

[d]Sample included 17 teams in Nebraska.

[e]Sample included seven teams in Minnesota, California, and Arizona.

Table 2-4

Ratings of Statements about Team Meetings[a]

Statement	NE Teams[b]	Other Teams[c]
I am satisfied with the outcome of this meeting.	3.99 (1.07)	4.35 (.69)
My presence at this meeting was necessary.	3.97 (.96)	4.29 (.62)
The team approach is an effective way to make decisions about students.	4.38 (1.01)	4.76 (.43)

[a] 1 = Strongly Disagree, 2 = Disagree, 3 = No Opinion, 4 = Agree, and 5 = Strongly Agree.

[b] Numbers are means and standard deviations based on responses of 77 team members in Nebraska.

[c] Numbers are means and standard deviations based on responses of 35 team members in Minnesota, California, and Arizona.

Table 4-1

Reliabilities and Endorsement Percentages for the Yes-No Items

Abbreviated Items	Reliability	Yes	No	Not Applicable
Discussion Regarding Procedural Issues				
1. The purpose of the meeting is clearly stated.	.80	35	65	0
2. Additional goals for the purpose of improving or evaluating team functioning or productivity are clearly stated.	.70	0	100	0
3. The roles of the team members are clearly defined.	.80	0	100	0
4. A statement is made about the desirability of participation by all team members.	1.00	0	100	0
5. The decision(s) to be made during the meeting is(are) clearly stated.	.90	12	76	12
6. The reason for referral is clearly stated.	.80	84	16	0
7. A member keeps some written record of the meeting.	.90	72	28	0
Data Presentation and Utilization				
8. Data are explained in terms of how they relate to the problem (i.e., what they tell you, not just the score).	.90	81	3	16
9. The student's strengths as well as weaknesses are discussed.	.80	75	19	6
10. Comparisons occur across different sources of data with evaluation of implications.	.60	*	*	*
11. Everyday behavioral and academic data about the child are presented.	.80	84	13	3
12. The provisions and modifications which have been made in the regular classroom in attempt to deal with the student problem(s) are presented.	.30	*	*	*
13. Systematic behavioral observation data, as well as formal testing, are presented.	.70	6	88	6
Evaluating Alternatives				
17. The team states the criteria for evaluating the alternatives	.60	*	*	*
18. A team member verbalizes the need to evaluate the placement decision on the basis of the least restrictive alternative.	.80	0	69	31
19. Each alternative is evaluated in terms of the child's educational needs or the selected criteria.	.40	*	*	*
Making the Final Decision				
20. Members attempt to reach through discussion a decision that all are willing to support.	.40	*	*	*
21. A decision(s) is(are) made.	.90	88	6	6
22. The final decision is clearly stated.	.40	*	*	*
Implementing the Decision				
23. The method for evaluation of the decision is specified.	.20	*	*	*
24. A timetable for the program is specified.	.20	*	*	*
25. The role of each team member in implementing the decision is described.	.40	*	*	*
26. The team evaluates its meeting as having attained/not attained its goals for the meeting.	.70	0	100	0
Meetings with Parents Present				
27. In the beginning of the meeting, the parents are asked about their expectations for the meeting.	1.00	0	100	0

Note: Some of the items have been abbreviated. The complete forms can be found in Appendix B

* Percentage not calculated due to low reliability.

Table 4-2

Reliabilities and Endorsement Percentages for the Likert Items

Item	Reliability	Not Applicable
Team Process		
14. Team members are attentive listeners (i.e., look at speaker, nod, etc.).	.60	*
All Members: * / Most Members: * / Few Members: *		
15. The team stays on task	.90	0
Always: 94 / Most of the Time: 6 / Some of the Time: 0		
Generating Alternatives		
16. For each decision to be made the team produces a list of alternatives for the child's educational needs.	.30	*
Only 1 Alternative Considered: * / Two Alternatives Considered: * / More than 2 Alternatives Considered: *		
Meetings with Parents Present		
28. The parents are included through the use of direct questions to them, comments and explanation directed to them, and asking if they have questions.	.80	0
Frequently: 47 / Occasionally: 40 / Rarely: 13		
29. The parent's input is requested during the meeting.	.80	0
Frequently: 27 / Occasionally: 53 / Rarely: 20		
30. Language is at a level which the parents can understand. When technical terms are used, they are accurately defined in a way that parents can understand.	.80	0
Almost all the time: 27 / Most of the time: 46 / Some of the time: 27		

Table 5-1

Percentages of Time Spent in Specific Activities[a]

Role	Discussing Curriculum	Evaluation Information	Behavior	Child Performance	Personal/ Family
Resource Teachers	22	19	--	13	--
Parents	18	--	18	--	15
Classroom Teachers	24	--	47	14	--

[a]Data are those reported by Goldstein et al. (1980). The authors included only the highest three categories for each role.

Table 5-2

Percentages of Total Meeting Time Spent Discussing Academic, Behavioral, and Physical Data

Type of Data	Mean	Median	Range
Academic	22.6	22.5	0 - 47
Behavioral	12.6	10.0	1 - 31
Physical	1.2	0.0	0 - 07

Table 5-3

Percentages of Total Meeting Time Spent Discussing Academic and Behavioral Data as a Function of Referral Concern

Referral Concern/ Type of Data	Mean	Median	Range
Academic Referral[a]			
Academic Data	26.8	29.5	7 - 47
Behavioral Data	8.2	8.5	1 - 12
Behavioral Referral[b]			
Academic Data	9.8	9.5	0 - 22
Behavioral Data	20.3	23.0	8 - 31
Academic/Behavioral Referral[c]			
Academic Data	22.0	22.0	7 - 33
Behavioral Data	12.0	11.5	4 - 24

[a]Number of meetings = 16.

[b]Number of meetings = 6.

[c]Number of meetings = 6.

Table 5-4

Percentages of Total Meeting Time Spent Discussing Academic and Behavioral Data as a Function of Meeting Length

Meeting Length/ Type of Data	Mean	Median	Range
0 - 15 Minutes[a]			
Academic Data	19.7	17.0	7 - 46
Behavioral Data	12.3	11.0	1 - 28
15 - 30 Minutes[b]			
Academic Data	18.1	19.0	0 - 40
Behavioral Data	14.3	10.0	7 - 31
30 or more Minutes[c]			
Academic Data	29.7	31.0	16 - 47
Behavioral Data	11.3	10.0	4 - 28

[a]Number of meetings = 10.

[b]Number of meetings = 11.

[c]Number of meetings = 11.

Table 5-5

Percentages of Total Meeting Time Spent Discussing Academic and Behavioral Data as a Function of Sex of Student

Sex of Student/ Type of Data	Mean	Median	Range
Male[a]			
Academic Data	24.8	25.0	0 - 47
Behavioral Data	13.9	11.0	1 - 31
Female[b]			
Academic Data	18.3	19.0	2 - 36
Behavioral Data	10.2	9.0	7 - 21

[a]Number of meetings = 21.

[b]Number of meetings = 11.

Table 6-1

Examples of Information Coded for Various Assessment Domains

Domain	Examples of Items Coded
Intelligence	He scored 97 on the Slosson.
	His Information score on the WISC-R was 10.
	He answered all of the Vocabulary items.
Achievement	His PIAT Mathematics score was 3.7.
	His spelling tests are usually very poor.
	He scored below his brother in math.
Perceptual-Motor	He did poorly on the Bender; his developmental age was 5.3.
	He made six errors on the VMI.
	His Frostig performance was quite low.
Personality	He drew a very poor human figure.
	He said the third Rorschach plate was a spider.
	His performance suggests a low self-concept.
Psycholinguistic	He missed many items on the Wepman.
	His I.T.P.A. profile was unbalanced.
	He did poorly on the Goldman-Fristoe.
Classroom	He fights frequently.
	He never finishes his work.
	He did poorly on my informal reading test.
Other	All other information not described above.

Table 6-2

Distribution of Time Spent for Various Domains of Information Discussed in Placement Meetings

Domain	Percentage of Total Time	Percentage of Assessment Time	Actual Time in Minutes
Intelligence	7.39	15.46	2.04
Achievement	14.35	28.85	4.10
Personality	1.92	5.08	0.44
Perceptual-Motor	2.45	4.64	0.99
Psycholinguistic	4.16	7.97	1.45
Classroom	16.94	37.63	5.30
Other	52.80	---	15.25

Note: Average time for meetings was 30 minutes.

Table 6-3

Frequency with which Various Domains of Information were Discussed

Domain	Most Frequent	2nd Most Frequent	3rd Most Frequent
Intelligence	4	1	5
Achievement	5	8	5
Personality	1	1	0
Perceptual-Motor	0	1	1
Psycholinguistic	0	3	5
Classroom	10	6	2

Table 7-1

Examples of Statements of Expected and Actual Performance

Statements of Expected Performance
His intelligence test scores are above average.
The rest of the class is reading at grade level.
Her chronological age is 7 years 4 months.
Book Four is the expected reading level for his age group.
Children in this school score well above the national averages.
She is just beginning second grade.
Most children in his class have mastered this skill.
Statements of Actual Performance
His I.Q. scores on the WISC-R were PIQ = 96, VIQ = 105, FS = 101.
She is reading at expected grade level.
Scores obtained on the PIAT were 3.4 in Math, 3.8 in reading, 3.2 in spelling, and 4.7 in general information.
He is working in Book Six in Addison-Wesley Math.
Her math achievement test scores are above the school average.
He has mastered all grade three skills in spelling.

Table 7-2

Examples of Statements Related to Selected LD Criteria

Statements Related to Ability/Achievement Discrepancy
His IQ scores are average (i.e., 104), but he is 2 years behind in reading.
She is functioning like an 8 yr. old in reading, but she is actually 12 years of age.
SRA scores were 1-3 years below expected grade level.
Statements Related to Verbal/Performance Discrepancy
His verbal IQ score on the WISC-R is 105, while his performance IQ score is 86; that is a 19 point discrepancy between the two.
Statements Related to the Federal Definition
He was referred because of deficient reading performance.
She reverses many of her letters on writing assignments.
His I.Q. is in the average range.
Her audiogram showed normal hearing.
There are no physical handicaps present.

Table 7-3

Rank Ordering of Meetings by Frequency of Data Presented

Rank	Meeting	Test Scores Reported	Test Names Mentioned	Decision[a] Made
1	13	12	2	NLD
2	10	11	1	NLD
3	1	8	1	SLBP
4	11	7	5	LD
5	2	7	1	SLBP
6	19	7	0	LD
7	8	6	1	LD
8	9	6	0	LD
9	12	6	0	LD
10	18	6	0	NLD
11	20	5	2	LD
12	5	5	1	LD
13	17	5	0	NLD
14	3	4	2	LD
15	14	4	1	NLD
16	7	4	0	LD
17	4	3	1	LD
18	6	3	0	LD
19	15	2	0	LD
20	16	0	0	NLD

[a]Decisions were NLD = not learning disabled, LD = learning disabled, and SLBP = special learning and behavior problem.

Table 7-4

Tabulation of Data Supportive of Placement Decisions

Made in Team Meetings

Meeting	Eligibility Criteria[a]			Decision[b] Made
	Abil/Ach Discrepancy	Verb/Perf Discrepancy	Federal Definition	
1	+	-	+	SLBP
2	-	-	+	SLBP
3	+	+	+	LD
4	+	-	+	LD
5	+	-	+	LD
6	+	-	+	LD
7	+	-	+	LD
8	+	-	+	LD
9	-	-	-	LD
10	+	-	+	NLD
11	+	+	+	LD
12	-	-	-	LD
13	-	-	+	NLD
14	+	-	+	NLD
15	-	-	-	LD
16	-	-	-	NLD
17	-	-	+	NLD
18	-	-	+	NLD
19	-	-	-	LD
20	+	+	+	LD

[a]Statements relevant to each criterion are coded as +; those not relevant are coded -.

[b]Decisions were NLD = not learning disabled, LD = learning disabled, and SLBP = special learning and behavior problem.

Table 8-1

Examples of Teacher Participation Categories

Category	Do Code	Don't Code
Classroom	He missed 20 days of school this year.	He's very insecure and unsure of himself.
	He's a good worker during math.	He's an accident waiting to happen.
Test	His score on the test put him in the average range.	He hates tests; doesn't he?
	On my reading inventory, he had the lowest score in the class.	He seems to be a very bright child.
Recommendation	I think he'd be better in the low group.	I think this boy needs help.
	Why don't we decrease the length of his math assignments.	I want him to do better than his brother.

Table 8-2

Content of Information Presented By and Elicited From Classroom Teachers in Placement Team Meetings

	Category of Information			
	Classroom	Test	Recommendations	Other
Presented by Teacher	43	7	3	47
Elicited from Teacher	51	3	2	42

Note. All values are percentages of total within each type of information.

Table 9-1

Categories, Their Definitions, and Examples of Coded Intervention Statements

Category	Definition	Example
Service Option	A statement is made concerning a service that might be delivered to a student or the individual who would deliver the service	speech therapy Title I Mary's reading group
Level of Service	A specification is made of the level or intensity of service that will be provided a student	one-to-one small group direct service
Goals and Methods	A specification is made of the desired outcomes of the program of services being planned for the the student and/or how a desired outcome is to be achieved	develop social skills provide lots of support cutting and pasting activities
Further Evaluation	A specification is made that further assessment activities, either formal or informal, need to be carried out with a student	diagnostic teaching do a hearing evaluation
Program Review or Evaluation	A statement is made concerning the need to review, at some later time, the planned program of services	we'll meet in April to review her program
Timing	The timing of the program of services is specified, such as when the program will begin or end	the program will begin next year
Recommendations to Parents	A statement is made describing how parents can work with their child in or out of the school setting; the implication is that such activity will further the goals of the program that is being planned for the student	play lots of card games with her

Table 9-2

Interrater Agreement for Each Category of Intervention Statement[a]

Category	Number[b]	Role[c]
Service Option	.87	.94
Goals and Methods	.74	.89
Further Evaluation	.75	.96
Program Review	.68	.71
Timing	.51	.90
Parent Recommendations	.38	.90

[a]Table includes average agreement between two observers across four meetings using two methods (Number and Role).

[b]Count of number of statements made within each category.

[c]Count of number of individuals initiating one or more intervention statements within each category.

Table 9-3

Service Options Initiated in Team Meetings Arranged by the Intensity of the Service Represented

Intensity of Service	Meeting Number														
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Regular Classroom plus Part-time Special Class	3	1	2	2	2	1	3	2	0	0	1	1	2	1	21
Regular Classroom plus Resource Room Help	0	0	0	0	0	0	0	0	1	4	1	1	0	0	7
Regular Classroom with Assistance by Intinerant Specialist	0	0	0	0	0	0	0	1	0	0	0	2	0	0	3
Regular Classroom with Consultative Assistance	0	0	0	0	0	0	0	0	0	0	1	0	2	0	3
Regular Classroom (with minimal or no modification)	1	0	1	0	1	0	1	2	0	1	1	0	1	1	10
Overall	4	1	3	2	3	1	4	5	1	5	4	4	5	2	44

Table 9-4

Activity by Role of Team Members in Initiating Service Options Across 14 Meetings

Team Member	Number of options initiated (A)	Number in role across meetings (B)	Activity[a] Ratio A/B
Principal	9	12	.75
School Psychologist	9	14	.64
LD Teacher	6	9	.67
SLBP Teacher	5	7	.71
Resource Teacher	4	5	.80
Learning Center	2	4	.50
Speech/Language	2	9	.22
Regular Teacher	2	15	.13
Math Teacher	1	1	.00
Special Education Supervisor	1	3	.33
Parent	1	13	.08
Health Coordinator	0	1	.00
Child Psychologist	0	1	.00
Community Resource Worker	0	1	.00
Reading Teacher	0	3	.00
Title I	0	5	.00
Community Psychologist*	1	-	-
Occupational Therapist*	1	-	-
Total	44	103	

[a]Activity ratio was calculated only for roles with at least 5 members represented across meetings.

[b]Not present at meeting but recommendation made in report.

Table 9-5

Team Member Roles Matched with Service Options Initiated in Meetings

Team Member	Service Options: Total Number Identified	Identified with role	Not Identified with role
Learning Center	2	2	0
Speech/language	2	2	0
SLBP Teacher	5	3	2
LD Teacher	6	3	3
Regular Class Teacher	2	1	1
Math Teacher	1	0	1
Title I Teacher	0	0	0

Table 9-6

Activity of Team Members
in Initiating Goals and Methods Statements[a]

Team Member	Number of individuals initiating statements (A)	Number in role across meetings (B)	Activity Ratio (A/B)
School Psychologist	11	14	.79
SLBP Teacher	5	7	.71
LD Teacher	6	9	.67
Resource Teacher	3	6	.50
Regular Teacher	5	15	.33
Speech/language	3	9	.33
Parent	4	13	.31
Principal	3	12	.25
Title I	1	5	.20

[a]Only roles with five or more individuals present across all 14 meetings are included in the analysis.

Table 10-1

Meeting Participants' Roles

Role	Number	Percentage
Regular teacher	43	27.9
LD teacher	35	22.7
Principal/administrator	20	13.0
School psychologist	16	10.4
Parent	12	7.8
Speech/language specialist	12	7.8
Special teacher[a]	6	3.9
Counselor	3	1.9
Social worker	3	1.9
Educational diagnostician	2	1.3
Clinical/Child psychologist	1	0.6
School nurse	1	0.6

[a]This category included special teachers such as resource teachers, Title I teachers, and reading teachers.

Table 10-2

Four Professionals Included on Hypothetical Placement Team[a]

Role	1st[b]	2nd[c]	3rd[d]	4th[e]	Average
Regular teacher	31.2	14.7	37.0	15.9	24.7
LD teacher	25.0	23.1	25.2	14.4	21.9
School psychologist	23.6	23.8	12.6	16.7	19.2
Principal/Administrator	6.2	15.4	8.1	18.9	12.2
Speech/Language specialist	9.7	10.5	5.9	12.1	9.6
Special teacher	1.4	7.0	3.7	9.1	5.3
Counselor	1.4	0.0	5.2	6.8	3.4
Social worker	0.0	0.7	0.7	4.5	1.5
Educational diagnostician	0.7	2.1	0.0	0.7	0.9
Special education teacher	0.0	1.4	0.0	2.3	0.9
Clinical/Child psychologist	0.0	0.0	1.5	0.0	0.4
Case manager	0.7	0.0	0.0	0.0	0.2
Doctor	0.0	0.7	0.0	0.0	0.2
School nurse	0.0	0.7	0.0	0.0	0.2
Student	0.0	0.0	0.0	0.7	0.2

[a]Numbers are percentages.

[b]First choices were listed by 144 subjects.

[c]Second choices were listed by 143 subjects.

[d]Third choices were listed by 135 subjects.

[e]Fourth choices were listed by 132 subjects.

[f]This category included special teachers such as resource teachers, Title I teachers, and reading teachers.

Table 10-3

Percentages of Subjects Participating in Various Team Meeting Activities

Activity	Percentage
Presenting data	61.7
Interpreting information	60.4
Commenting on others' data	79.9
Proposing alternative outcomes	45.4
Evaluating alternative outcomes	39.6
Discussing final outcomes	61.7

[a]N = 154.

Table 10-4

Percentages of Subjects Indicating Most Time Was Spent in Various Meeting Activities

Activity	Percentage[a]
Presenting data	48.4
Interpreting information	8.6
Commenting on others' data	18.7
Proposing alternative outcomes	7.1
Evaluating alternative outcomes	3.3
Discussing final outcome	3.2

[a]Percentages are based upon the number of subjects who had indicated that they participated in each activity. Percentages do not total 1.00 since some subjects indicated that they participated in activities, but did not rank the amount of time spent in each.

Table 10-5

Means and Standard Deviations of Ratings of Factors Influencing the Outcome of the Team Meeting

Factor	Rating[a] Mean	SD
Data		
Teacher reports of child's classroom achievement	4.40	0.79
Information from child's parent/guardians	3.70	1.16
Child's scores on achievement tests	3.68	1.49
Teacher reports of child's social behavior	3.56	1.18
Observational data other than teacher reports	3.49	1.26
Child's scores on intelligence tests	3.23	1.59
Child's scores on psycholinguistic tests	2.84	1.59
Child's scores on perceptual-motor tests	2.53	1.62
Medical information	1.99	1.33
Institution and External Constraints		
Availability of services	3.64	1.25
Teacher-child match	2.44	1.39
Child's school attendance record	2.31	1.38
Child Characteristics		
Parental power in school system	1.90	1.28
Child's socioeconomic status	1.66	1.02
Child's physical appearance	1.59	0.99
Child's sex	1.29	0.56
Child's race	1.18	0.50

[a]Ratings were made on a scale from one to five, where 1 = no effect, 2 = insignificant effect, 3 = moderate effect, 4 = significant effect, and 5 = very significant effect.

Table 10-6

Subjects' Responses to Four Statements on Reactions to the Team Meeting[a]

Statement	SD	D	NO	A	SA
I am satisfied with the outcome of the meeting	0.0	0.0	3.3	58.3	38.4
My view of this child changed significantly as a result of attending this meeting	12.1	32.1	22.8	29.3	3.6
My presence at this meeting was necessary	0.0	2.0	4.7	56.8	36.5
The team approach is an effective way to make decisions about students	2.0	0.0	0.6	28.9	68.4

[a]Likert scale was: SD = strongly disagree, D = disagree, NO = no opinion, A = agree, SA = strongly agree. Numbers are percentages of subjects.

APPENDIX A

Videotaping Procedures

Description of Procedure for Videotaped Meetings

Set-up

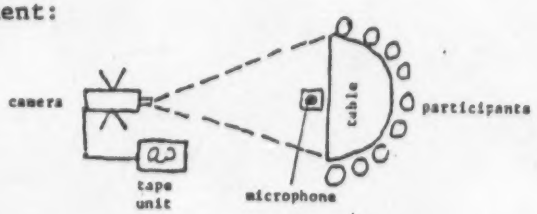
1. Use any videotape equipment that you have. Please indicate the type of machine you use on the enclosed label; attach the label to the videotape.

2. Check equipment to make sure it is working properly.

3. Set up equipment 1/2 hr. prior to meeting. In order to obtain the best results, use the following three guidelines:

   a. Arrange seating so no participant will be blocked from camera's view by another participant.
   b. Situate camera as close as possible, yet far enough away to pick up all participants' faces.
   c. Place microphone close to participants (on separate table if possible, so that it does not pick up table noises).

   Sample arrangement:



4. Have all participants sign consent forms. Collect them.

Filming

1. Introduce procedure to participants by reading the following statement:

> Today's meeting will be videotaped for a research project being conducted by researchers in the Psychoeducational Studies Department at the University of Minnesota. They are using videotapes of meetings throughout the United States in order to describe what happens and how decisions are reached. The videotaping is being done only for research purposes.
>
> As much as possible, please act as though the videotape equipment was not here. Conduct the meeting as you would normally. When the tape begins, introduce yourself by title (such as child's teacher, reading specialist, parent, and so on). The meeting can then proceed as usual. Please use only the child's first name to insure anonymity. Try to speak in a normal conversational voice. If the tape needs to be changed during the meeting, please stop the meeting until the tape is ready.

(OVER)

At the end of the meeting, you will be asked to fill out a short form about the meeting. If you must leave the meeting early, please be sure to get one of the forms and fill it out before leaving. It requires only a couple of minutes. The researchers want everyone to fill it out. It will supply important supplementary data for their research. Are there any questions?

2. Begin videotaping, with participants giving their titles.

3. Be unobtrusive. Sit away from equipment. Approach it only to change tapes.

Questionnaires

1. At conclusion of meeting, have all participants complete the Placement Team Follow-up questionnaire.

2. Meeting coordinator should complete the Placement Team Information form. Put the ID number (found in the top right-hand corner of the Placement Team Information form and on the videotape label) on all permission forms and all completed Placement Team Follow-up questionnaires.

3. Send all materials (permission forms, Placement Team Information form, Placement Team Follow-up questionnaires, videotape, and IEP, if developed at meeting) by registered mail to:

James E. Ysseldyke, Ph.D.
223 Fraser Hall; 106 Pleasant St. S.E.
University of Minnesota
Minneapolis, MN 55455

UNIVERSITY OF MINNESOTA
TWIN CITIES

College of Education

Department of Psychoeducational Studies
249 Burton Hall
178 Pillsbury Drive S.E.
Minneapolis, Minnesota 55455
(612) 373-3483

Participant Consent Form

I agree to permit researchers from the Psychoeducational Studies Department at the University of Minnesota to use, for research purposes, the videotape of a placement team meeting in which I participated. The tape may be viewed only by those researchers; appropriate data may be summarized and published.

I agree to the above with the understanding that at no time will my name, the name of my school, or the name of the student be publicly identified.

_____
(Name)

_____
(Position)

_____
(Date)

Parent Consent Form

Dear Parents,

As part of a research program funded by the U.S. Office of Education, researchers in the Psychoeducational Studies Department at the University of Minnesota are studying the placement team process as it occurs in schools. The goal is to describe what happens at such meetings and how decisions are reached. Our school has been asked to participate in the study by permitting the proceedings of our placement team staffing to be videotaped.

We are seeking your permission to videotape the meeting about your child for the researchers. Both you and your child will be protected - your identities will be kept anonymous. The information obtained is for research purposes only. The videotapes will be viewed only by selected members of the research team.

Please indicate below whether you give permission for the placement team meeting about your child to be videotaped. If you do not give your permission, this will in no way jeopardize the activities of the placement team meeting about your child.

As part of their responsibility to their funding agency, the researchers will be preparing a report on the placement team process. The report will not identify individuals involved in the process. Its focus will be on the procedures involved and how they might be strengthened. If you would like a copy of this report when it is completed, please indicate this below and include your mailing address.

- -

_____I(We) give permission for the videotaping of the placement team meeting about _____
(Child's name)

_____I(We) do not give permission for the videotaping of the placement team meeting about _____
(Child's name)

_____ _____
(Date) (Signature)

_____ _____
(Date) (Signature)

_____Please send a copy of the report when it is completed.

V
1/79
Form 2

APPENDIX B

Observation Instrument for Collection of Data on the Occurrence of Characteristics of Effective Team Meetings

Child Name _____

Tape number(s)_____

Coder_____

Date_____

Characteristics of Effective Team Meetings

Discussion Regarding Procedural Issues

(Questions 1 - 8 should occur within the first 5-10 minutes of the meeting)

Yes No

___ ___ 1. The purpose of the meeting is clearly stated (either verbally or in a written agenda).

Comments:

___ ___ 2. Team members are informed that one of the purposes of the meeting is compliance with due process legislation.

Comments:

___ ___ 3. Additional goals for the purpose of improving or evaluating team functioning or productivity are clearly stated. (An example of these additional goals is: "Remember that we agreed to use more behavioral or observational data in our decision making").

Comments:

___ ___ 4. The roles of the team members are clearly defined (beyond name and title).

Comments:

___ ___ 5. A statement is made about the desirability of participation by all the team members.

Comments:

___ ___ 6. The decision(s) to be made during the meeting is(are) clearly stated.

Comments:

___ ___ 7. If more than 1 decision is to be made, they are identified as separate.

Comments:

___ ___ 8. The reason for referral is clearly stated.

Comments:

___ ___ 9. A member keeps some written record of the meeting. (Includes filling out forms at the end of the meeting.)

Comments:

Data Presentation and Utilization

Yes No

___ ___ 10. Data are explained in terms of how they relate to the problem (i.e., what they tell you, not just the score).

Comments:

___ ___ 11. The student's strengths as well as weaknesses are discussed.

Comments:

___ ___ 12. Comparisons occur across different sources of data (e.g., classroom observation and standardized tests) with evaluation of implications.

Comments:

___ ___ 13. Everyday behavioral and academic data about the child are presented.

Comments:

___ ___ 14. The provision and modifications which have been made in the regular classroom in attempt to deal with the student's problem(s) are explained.

Comments:

___ ___ 15. Systematic behavioral observation data, as well as formal testing, are presented (i.e., a formal observation procedure was utilized).

Comments:

Team Process

16. Team members are attentive listeners (i.e., look at speaker, nod, etc.).

1	2	3
All Members	Most Members	Few Members

Comments:

17. Team members clarify other's remarks by questioning, paraphrasing, or elaborating.

1	2	3
All Members	Most Members	Few Members

Comments:

18. Team members seek information and opinions from others.

1	2	3
All Members	Most Members	Few Members

Comments:

19. The Team stays on task.

1	2	3
Always	Most of the Time	Some of the Time

Comments:

Generating Alternatives

Yes No

20. For each decision to be made the team produces a list of alternatives for the child's educational needs.

1	2	3
Only 1 Alternative Considered	Two Alternatives Considered	More than 2 Alternatives Considered

Comments:

___ ___ 21. The team suspends evaluation of the alternatives until the list is completed.

Comments:

Evaluating Alternatives

___ ___ 22. The team states the criteria for evaluating the alternatives

Comments:

___ ___ 23. A team member verbalizes the need to evaluate the placement decision on the basis of the least restrictive alternative.

Comments:

Yes No

___ ___ 24. Each alternative is evaluated in terms of the child's educational needs or the selected criteria.

Comments:

Making the Final Decision

25. Team members verbalize their opinions regarding the decision.

1	2	3
Every team member verbalizes an opinion	At least half the members verbalize an opinion	Only one or two members verbalize an opinion

Comments:

___ ___ 26. Members attempt to reach through discussion a decision that all are willing to support (i.e., a consensus decision).

Comments:

___ ___ 27. A decision(s) is(are) made.

Comments:

___ ___ 28. The final decision is clearly stated.

Comments:

Implementing the Decision

___ ___ 29. A statement is made about the flexibility of the decision.

Comments:

___ ___ 30. A method for changing the decision is clearly stated.

Comments:

___ ___ 31. A method for evaluation of the decision is specified.

Comments:

___ ___ 32. A timetable for the program is specified.

Comments:

___ ___ 33. The role of each team member in implementing the decision is fully described.

Comments:

Yes No

___ ___ 34. The team evaluates its meeting as having attained/not attained its goals for the meeting.

Comments:

Meetings with Parents Present

___ ___ 35. In the beginning of the meeting, the parents are asked about their expectations for the meeting (e.g., the parents are asked what they hope to learn from the meeting).

Comments:

36. The parents are included through the use of direct questions to them, comments and explanations directed to them, and asking if they have questions.

1	2	3
Frequently	Occasionally	Rarely

Comments:

37. The parent's input is requested during the meeting.

1	2	3
Frequently	Occasionally	Rarely

Comments:

38. The parent's input is responded to by paraphrasing, comparing to other sources of information, etc.

1	2	3
Frequently	Occasionally	Rarely

Comments:

39. Language is at a level which the parents can understand. When technical terms are used, they are accurately defined in a way that parents can understand.

1	2	3
Almost all the time	Most of the time	Some of the time

Comments:

Additional Qualitative Comments

APPENDIX C

Observation Sheet for Coding Discussion of

Academic, Behavioral, and Physical Data

Ten Second Intervals

	A	B	P
1.			
2.	X	X	
3.	X		
4.			
5.	X		
6.			
7.			
8.			
9.	X		
10.	X		
11.		X	
12.		X	
13.	X	X	
14.		X	
15.			
16.			
17.			
18.		X	
19.			
20.			
21.			
22.			
23.			
24.		X	
25.			
26.		X	
27.		X	
28.		X	
29.			
30.			

	Academic A	Behavior B	Physical P
31.			
32.			
33.			
34.		X	
35.			
36.			
37.		X	
38.		X	
39.		X	
40.			
41.		X	
42.			
43.			
44.	X		
45.	X		
46.			
47.		X	
48.			
49.	X	X	
50.			
51.	X		
52.	X		
53.	X		
54.	X		
55.			
56.			
57.			
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60.		END	

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88.			
89.			
90.			

13/17/0
A B P

APPENDIX D

Post-Meeting Survey Form

ID #_____

Placement Team Follow-up

1. What was your role in the meeting (e.g., parent, teacher, principal, etc.)? _____

2. The following six categories represent activities that people may engage in during a team meeting. Please check the boxes of those activities in which you personally participated during this meeting. Then, on the lines, please rank the checked activities according to the amount of time that you personally spent in each (1 = most time, 2 = next most time, etc.).

   ☐ ___ Presenting data
   ☐ ___ Interpreting information
   ☐ ___ Commenting on data presented by others
   ☐ ___ Proposing alternative outcomes
   ☐ ___ Evaluating alternative outcomes
   ☐ ___ Discussing the final outcome

3. How much time do you estimate you spent collecting information on this child for this meeting? _____

   This amount of time was (circle one): Inadequate Adequate Excessive

4. Please check the appropriate column to indicate the degree to which you agree/disagree with the following statements.

	Strongly Disagree	Disagree	No Opinion	Agree	Strongly Agree
I am satisfied with the outcome of this meeting.	___	___	___	___	___
My view of this child changed significantly as a result of attending this meeting.	___	___	___	___	___
My presence at this meeting was necessary.	___	___	___	___	___
The team approach is an effective way to make decisions about students.	___	___	___	___	___

5. Please rate the effect of the factors listed below on the outcome(s) of this team meeting. Use the following numbers to indicate the effect of each factor:

   1 = None 2 = Insignificant 3 = Moderate 4 = Significant 5 = Very significant

   ___ The child's school attendance record
   ___ Teacher reports of the child's classroom achievement
   ___ Medical information
   ___ The child's race
   ___ The child's scores on intelligence tests
   ___ The "power" of the child's parents in the school system
   ___ The availability of services
   ___ The child's socioeconomic status
   ___ Observational data other than teacher reports
   ___ The child's scores on psycholinguistic tests
   ___ The match between the child and the teacher to whom the child would be assigned
   ___ The child's physical appearance
   ___ Teacher reports of the child's social behavior
   ___ Information provided by the child's parents/guardians
   ___ The child's scores on perceptual-motor tests
   ___ The child's sex
   ___ The child's scores on achievement tests

   Other factors (please list and rate)

   ___ _____
   ___ _____

   Of all the data presented at this meeting, which were most useful in making decisions? _____

6. If a placement team meeting was limited to four professionals and the parents, which four professionals would you choose to include?

   _____ _____
   _____ _____

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